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Report on an Arts Administration Internship with the Louisiana Philharmonic Orchestra

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**A REPORT ON AN ARTS ADMINISTRATION INTERNSHIP WITH THE
LOUISIANA PHILHARMONIC ORCHESTRA
FALL 2011**

An Internship Report

**Submitted to the Graduate Faculty of
The University of New Orleans
in partial fulfillment of
the requirements for the degree of**

Master of Arts in Arts Administration

By

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Abstract

This report reviews the internal structure of the Louisiana Philharmonic Orchestra (LPO), a non-profit entity, and provides an analysis of issues facing the organization. A history of the LPO, description of programs, and staff structure review provide a basic understanding of the organization. For the purpose of this internship report, the timeframe of the internship took place from August 2011 through January 2012.

Chapter One

Organizational Profile

The Louisiana Philharmonic Orchestra (LPO) is a non-profit arts organization with operations based in New Orleans, Louisiana. The LPO is distinct amongst North American orchestras because it operates as the “only musician-owned and collaboratively managed professional symphony in the United States” (See Chapter 2 - LPO Mission Statement). Following the collapse and subsequent closure of the New Orleans Symphony in September 1991, the LPO was established shortly after by a group of 60 musicians belonging to the former organization, and held its first concert in November 1991.

The New Orleans Symphony was mired in financial difficulties accumulating throughout the 1980s. Greatest of these difficulties was a result of the deteriorating financial climate of major oil companies located within New Orleans. The Oil Bust of the 1980's caused many of the New Orleans oil companies to reduce or cease all together their corporate giving which left the New Orleans Symphony with an increasing deficit. Adding to this problem, the New Orleans Symphony embarked on costly renovations to its principal venue owned by the City of New Orleans, the renowned Orpheum Theater. From the renovations, the Symphony added a \$4 million debt to its increasing budget shortfalls of the 1980s ("Shostakovich Leaves New Orleans Symphony"). Beginning in the 1990–1991 Season, the Symphony had exhausted its endowment funds. The New Orleans Symphony was forced to cancel its 1991-1992 Season. Many of the musicians

were upset by issues regarding back pay due and feelings of poor management leading to the closure of the Symphony. Many members felt displaced by the cancellation of their season, but instead of fleeing the city in search of positions in other orchestras, roughly 60 musicians decided to pool their resources and talents to create a new orchestra. Besides having laid down their roots, the musicians firmly believed New Orleans deserved a full, professional orchestra and could provide the support required.

From the ashes of the New Orleans Symphony, the Louisiana Philharmonic Orchestra was born. The core group of musicians drew upon their experiences with the former organization. Their discussions pertained to re-evaluations of the failed policies, procedures, and factors relating to financial sustainability. The outcome was a commitment to maintaining a full symphonic orchestra, providing high-quality live classical music to the New Orleans area, and most importantly, remaining debt-free. While a few musicians owned and operated small businesses, the LPO musicians realized they required help to set up the new organization. This need prompted a successful solicitation for business and legal help in forming this new non-profit organization. The newly formed LPO's musicians and community advisors worked diligently, and from their decisions a new management model took form. The fundamental difference between the Louisiana Philharmonic and other North American symphony organizations lies in the corporation's "Members," those persons who, under law, and as shareholders in a for-profit corporation, "own" and possess all beneficial interest in the nonprofit corporation of which they are "Members." The bylaws provide that a "Member" must be an orchestra member, and the orchestra, as a whole, "owns" the Louisiana Philharmonic Orchestra. Under this model, the LPO continues to legally

operate as a non-profit entity, but a major difference is in the inherent “ownership” or “control” of the orchestra. “One fundamental to keep in mind is that, except in the rare instance of a stock-based nonprofit corporation, no one owns a nonprofit organization. *Control* of a nonprofit, however, is another matter” (Hopkins 17). While a non-profit entity cannot be truly owned by anyone, the LPO operates on a model which borrows certain titles and characteristics from the for-profit world. Because many of these borrowed items are important to the functioning of the organization, the LPO uses certain language not normally found within bylaws of non-profit organizations. The musicians themselves maintain final oversight of all policies and governance and are paid in terms of “share” instead of a set salary (See Appendix A: p. 1). Traditionally, orchestra musicians have little to no influence in the proceedings of the organization, but under the new model the musicians are given control and borrow certain elements from for-profit structures (i.e. the “musicians” become “shareholders”).

Having financial control over the organization was and remains very important to the musicians. Many of the musicians were cautious of the financial pitfalls they had endured with the New Orleans Symphony as “they [the musicians] had been getting partial paychecks for four months, and were owed six weeks’ back pay”(“Shostakovich Leaves New Orleans Symphony”). There were myriad other previously stated issues which have played a substantial role in the closure of the New Orleans Symphony. The musicians sought to overcome these obstacles while ensuring a better work environment for themselves and future musicians. In terms of a traditional orchestra model, it was clear “except for their collective-bargaining leverage during contract negotiations, the musicians were relatively powerless” (Fogel “Are Three Legs

Appropriate?”). Many of the tenets agreed upon by the newly created LPO Board were aimed at eliminating the lack of power and providing job security for the highly skilled musicians by being “...fully informed of all relevant information about the orchestra’s strategy, finances and challenges, and participating meaningfully in setting direction (i.e. *governance*), determining artistic programming, and fund raising” (Noteboom 16).

The musicians’ unique role in the LPO governance structure was distinctive in the realm of non-profit symphony orchestra management and was a precursor to a growing national trend to integrate more musician participation. The LPO remains the sole symphony to declare and continue its innovative musician ownership throughout the organization.

Understanding that the community may have issues of non-transparency with the LPO, the LPO recognized “it is the board’s presence that gives the organization integrity in the community...and the board is credible in the community because the trustees are perceived as objective, neutral, honest representatives of the community.” (Noteboom 5 & 6). This need of trust from the community was fulfilled by recommending and voting on non-musician community members to serve as Community Trustees. The LPO bylaws stipulate the use and empowerment of these Community Trustees to form the collaborative partnership model of the organization.

Many of the administrative tasks were delegated between the musicians, but the appointment of a full time Music Director was a growing need. The Music Director serves two primary purposes: performing as a conductor and playing a significant role in artistic programming decisions. It is important to recognize that all other symphony organizations in the U.S. appoint the Music Director by a vote of the Board, but the

unique structure the LPO enables the musicians/owners to appoint the Music Director by a majority vote during a Corporate Meeting (See Appendix A: p. 24). It is unclear in what capacity a Music Director functioned with the LPO during its first four years, but the LPO did not have a full-time Music Director until 1995. Klauspeter Seibel was appointed the first full-time Music Director of the LPO beginning in the 1995-1996 Season and continued in this position for a decade. Seibel retired in 2005, but continued to serve as principal guest conductor until his death in January 2011. The youthful conductor Carlos Miguel Prieto has led the LPO since his inaugural concert in 2005 and continues to maintain a very vigorous international conducting schedule with positions including Principal conductor of both the National Symphony of Mexico and the Youth Orchestra of the Americas.

Staff Structure

The general staff management structure of the LPO is comprised of five key “tiers” governed at the top by the Board of Trustees (See Appendix B). The first of these tiers holds only one position, the Managing Director. This position is responsible for providing leadership and managing the ongoing affairs of the corporation through its administrative staff in collaboration with the members of the corporation as represented by the Musicians’ Committee and the community as represented by the Community Trustees (See Appendix A: p.26). Although the Music Director is not represented within the given structure, based on my experiences the position is often assumed to be near or equal to the Managing Director. The second tier is reserved for the Director of

Finance with the Information Technology Director under his supervision. The bulk of daily duties are carried out by the third tier consisting of the Director of Development, Director of Education, Director of Marketing, and Director of Art & Operations. It is important to note that, in previous seasons, the Director of Art & Operations position was placed in the second tier and titled "General Manager". While I do not know what has precipitated this change, I can speculate that the change was made mostly to save funds on personnel salaries but it is unclear where these funds may have been allocated. The fourth tier is comprised of the Librarian, Personnel Manager, Operations Manager, Patron Revenue Manager, and Associate Director of Development. The last of these key tiers consists of the Production Manager, Personnel Administrator, Library Assistant, Box Office Manager, and Grant Writer. There are other positions below these tiers such as Stage Hands and Box Office Assistant. These positions do not as directly affect the organization's overall management.

At the beginning of the 2011-2012 Season, there were a number of staffing gaps which caused much of the work to be spread throughout the other departments. This staff change was equivalent to one-fourth of the overall staff. The staff change left the positions of Grant Writer, Development Associate, Director of Marketing, Director of Development, and Director of Artistic Planning and Operations (renamed from General Manager) vacant until mid-season.

Chapter Two

Mission Statement & Programs

“The Louisiana Philharmonic Orchestra, founded in 1991 by musicians from the former New Orleans Symphony, is the only musician-owned and collaboratively managed professional symphony in the United States. Members of the LPO are dedicated to creating live symphonic music and maintaining a resident full-time orchestra that serves as an integral part of the cultural and educational life of New Orleans and the Gulf South region.” (LPO Mission Statement)

The Louisiana Philharmonic Orchestra (LPO) operates on a thirty-six week concert calendar beginning in September and finishing in late May. Pertinent to its unique “musician-controlled” distinction, the LPO maintains a program for the orchestra musicians to take leaves of absence to grow musically and further pursue their personal musical goals after playing for five consecutive seasons. Additionally, the LPO has similar opportunities to allow and encourage its staff to learn from peers around the nation by visiting with other orchestras.

The LPO continues to focus on providing high caliber symphonic music, but since Hurricane Katrina has lost its primary venue, The New Orleans Orpheum Theater. As a result of this loss, the LPO has increased its geographical reach.

The “Classics series” is considered the orchestra’s flagship initiative because all performances occur in New Orleans at both the Mahalia Jackson Theater and First

Baptist Church of New Orleans. Often concert programs will be duplicated in the “Covington series” which serves as an outreach across Lake Pontchartrain at First Baptist Church of Covington. Most recently the “Jefferson series” was added to serve patrons residing in Jefferson Parish. This series takes place in First Baptist Church of Kenner, but will be moved to the new Jefferson Parish Performing Arts Center on its completion.

The other leg of LPO’s major programs is music education. Early Explorer’s Concerts are designed for pre-K through first grade students to explore connections between music and early learning while providing time for students to “meet the instruments”. Young People’s Concerts are performed by the full orchestra for students in second through eighth grades. A select few young performers take the stage during these concerts as featured winners of the LPO-sponsored Young Artists’ Concerto Competition. As part and parcel of the musician proprietorship of the LPO, all education endeavors are subject to review by the LPO Education Committee. While the LPO maintains a full-time Director of Education on staff, the Orchestra President “shall appoint each season a tenured member of the corporation (i.e. musician)...to work collaboratively with education, development, and production staff in the creation of educational initiatives including those designed to elicit external funding, in the planning of programs to implement those initiatives, and in the assessment of the effectiveness of these programs (See Appendix A: p.12). Before any of these programs can take place, much planning and hard work is required by the LPO staff and musicians to make these events possible.

Chapter Three

Internship Description & Contributions

During most of my internship with the LPO, I was assigned to the department of Operations and Production. With the beginning of the 21st Season of the LPO, there was a considerable workload for Operations. Since the recent departure of the General Manager (Artistic & Production), Director of Development, and Director of Marketing, much of the work was spread throughout the other departments. The lack of senior staff severely limited my prospects of working in many departments. My background prior to coming to the LPO was primarily in Operations. Given that much of the present and future work of the orchestra would be based in the same field, thus, the LPO assigned me to Operations and Production.

Former President of the League of American Orchestras Henry Fogel, in “What is This Beast Called Management?” describes the basic responsibilities and duties of Operations as:

- All logistics-stagehands, orchestra set-up, etc.
- Touring-negotiating and running
- Possesses closest relationship with musicians
- Manages musician labor contracts
- Supervises personnel manager
- Engages subs and extras
- Oversees facilities - might oversee office operation

- Orchestra Library
- Logistics for meetings, development functions, ancillary concerts (Chamber, Community programs, Education), and logistics for amplified concerts (Fogel 6).

While most of above mentioned responsibilities apply to the LPO, orchestras can vary on how some of these duties are separated or shared with other departments. Most notably, the LPO separates the Orchestra Library from most daily tasks for Operations, but both reside under Production.

Within the LPO Operations Department, my specific tasks included:

- Liaising with guest artists to confirm pickup times and locations for air travel
- Confirming transport and practice times for guest artists
- Providing transport for guest artist rehearsals with the orchestra
- Arranging guest artists' hospitality
- Escorting guest artists to post concert receptions
- Verifying all Box Office equipment and supplies in the Mobile Box Office Trunk
- Setting-up Mobile Box Office, Ticket Scanners, and verify working condition of all equipment
- Setting-up any required amplification equipment at pre-concert lecture sites
- Serving as House Manager during appointed rotation amongst staff
- Liaising with artist merchandise supplier to arrange shipment of product, set-up and supervise all on-site merchandise (i.e. CD's) sales, collect payments,

prepare final reconciliation report for product supplier and ship remaining merchandise back to supplier

- Checking dressing rooms after concerts
- Issuing and/or verify receipt of all guest artist and presenter contracts, insure all contract signatures have been obtained, and return signed contracts
- Liaising with artist managers when contracts are missing or require clarification
- Booking all travel for LPO guest artists and extra musicians
- Booking all hotel reservations for guest artists and managers
- Filing all necessary work visa documents for foreign guest artists
- Arranging housing with LPO volunteers for visiting extra musicians
- Scheduling and supervise all production meetings, preparing and reviewing agendas for all production meetings, and creating supporting materials required for each production meeting (i.e. concert running orders, stage plots, etc.)

Many of the items stated are primarily associated with artistic planning (i.e. Contracts and Visas), but since the position of Director of Artistic Planning and Operations was not filled until December 2011, it was necessary that I complete much of the work since it was left for Operations to finish.

Because I was assigned primarily to the Operations department, I did not have much interaction with many of the other areas and departments of the orchestra staff. However, I did have the opportunity to work with Director of Finance, Joe Touns, on constructing a “new hire” payroll form after the LPO switched to a different payroll distribution company (See Appendix D) and on collecting data for the creation of a

physical asset database. Also, I worked with the Director of Marketing on the LPO website concert promotions. I wanted to learn more about the interaction between the departments especially Marketing and Development, and how their decisions affect the Operations workflow.

While my paid internship officially ended in January, 2012, my engagement with the LPO continued through the end of the fiscal year on June 30th, 2012. I was uncertain whether or not I would be able to stay with the LPO until one day before the end of my internship. The Managing Director offered a contract extension and a title promotion to Assistant to the Managing Director. With this promotion, I report directly to the Managing Director for duties, but I continue to provide support for Operations and Artistic Planning departments. The position also expands my responsibilities to assist in the Education department with coordinating school visits between the individual LPO musicians and music teachers, logistics regarding LPO school visits as a whole orchestra ensemble, and logistics for the Early Explorers and Young People's Concerts. Much of my work from January through June was tied to the implementation and fulfillment of an extensive three year grant from the Andrew W. Mellon Foundation. (See Appendix E) Because the Mellon Foundation grant requires serious operational logistics and production planning, my assistance is most needed in the Operations and Artistic departments.

Chapter Four

S.W.O.T. Analysis

<i>STRENGTHS</i>	<i>WEAKNESSES</i>
<ul style="list-style-type: none">• Excellent Product• Sole Full-Time Professional Orchestra within Louisiana• High Level of Musician Input• Broad Reach of Orchestra Education Programs	<ul style="list-style-type: none">• New Staff Members Account for 25% of Staff• Indistinct Job Responsibilities Between Director of Artistic Planning & Operations and Operations Manager• Undue Expenses and Personnel Strain from Out-of-Town Musician Extras• Guest Artist Fees & Expenses Too Excessive
<i>OPPORTUNITIES</i>	<i>THREATS</i>
<ul style="list-style-type: none">• Build Brand Awareness through Artistic Collaborations• Provide Chamber Music Concerts• Increase Market Exposure Through Streaming and Webcasting Concerts• Strengthen Relationships with Other Local Organizations	<ul style="list-style-type: none">• Small Number of Large Corporations in Area• Third Fiscal Year Ending in Budget Deficit• Lacking an <i>Integrated Media Agreement (IMA)</i> between Musicians and Organization

Regardless of how efficient and effective an organization may appear, each possesses its fair share of issues. It is important for organizations to analyze the challenges they face in order to overcome weaknesses and build upon strengths. During the course of my internship, there were many issues with the LPO which resulted in staff hardships. Most of the strengths are understood by the LPO management. However, the weaknesses, opportunities, and threats of the LPO have either been downplayed in significance or not recognized at all. For the purpose of providing useful criticism, I will aim to identify the strengths and weaknesses of the organization and then showcase the opportunities of the organization while also designating its threats.

Strengths

I.

Excellent Product

If the product quality of the non-profit is subpar, then even the best business policies and practices in the industry will prove ineffective for sustaining and growing the organization. Fortunately for the LPO, the quality of the artistic product is consistently high. Since its inception, the LPO has won numerous awards and accolades with its most recent award being “Best Classical Performance” for its November 5th, 2011, performance of Shostakovich’s Symphony No. 5 at the *Big Easy Music Awards* in February 2012 (Smason artsamerica.org). This award, coupled with an all-time high in subscriptions, is one of many reflections of the level of excellence at which the LPO continuously performs.

II.

Sole Full-Time Professional Orchestra within Louisiana

There are at least seven different professional orchestras within the State of Louisiana which provide their communities with classical music through concerts and education events. These orchestras include: Shreveport Symphony Orchestra, Natchitoches-NSU Symphony Orchestra, Monroe Symphony Orchestra, Rapides Symphony Orchestra, Acadiana Symphony Orchestra, Baton Rouge Symphony

Orchestra, and the Louisiana Philharmonic Orchestra. While six other orchestras within the same state as the LPO could be viewed as a possible threat, the LPO holds a key strength because it is the only orchestra to maintain a full-time roster of sixty-seven musicians for an entire season. This provides a steady income for highly trained professional musicians and develops its programming across its seasons without constantly changing the roster of musicians. Because the musicians do not vary greatly from concert to concert, the ensemble continues to grow artistically, further adding to the higher quality of product. Additionally, the presence of full-time professional musicians provides local universities and schools with a pool of high quality music instructors otherwise unsustainable if not for the LPO.

III.

High Level of Musician Input

As mentioned previously, the musicians of the LPO have a high level of input in the LPO model. Many of the governing board members are LPO musicians. However, all of the committees (Concert Committee, Education Committee, etc.) are comprised of LPO musicians. No other orchestra in the United States allows musicians this level of input, an omission which often causes frustration and tension between musicians and orchestra administrations. These strains sometimes lead to pay disputes as in the recent example of the St. Louis Orchestra (Wakin).

At the LPO the level of musician input greatly increases the amount of musician buy-in and support. For example, the willingness of musicians to voluntarily participate

in development events is a highly beneficial to the organization. Each season LPO musicians also work with staff members to plan and improve education concert programs. These examples of LPO musician input and support are true sources of strength which will continue to benefit the organization.

IV.

Broad Reach of Orchestra Education Programs

Among the hallmarks of arts non-profits are the educational programs they provide to the local communities. The LPO boasts a healthy and vibrant variety of orchestra education programs reaching many parts of Louisiana. Most of the programs take place within Greater New Orleans and the East Bank of Jefferson Parish. Yet during the 2011-2012 season, many schools from distant parishes (counties) such as St. Charles, Lafourche, Plaquemines, etc. attended programs such as *Early Explorers* and *Young People's Concerts*. Additionally, the LPO distributes thousands of lesson guides to teachers across Louisiana for use as supplemental teaching materials in music and arts classes.

Weaknesses

I.

New Staff Members Account for 25% of Staff

One of the first major issues was the considerable staff change between the 2010-2011 Season and the 2011-2012 Season. During the summer of 2011, roughly a quarter of the LPO staff (5 of 20 positions) left the organization to pursue other opportunities. The staff change left the positions of Grant Writer, Development Associate, Director of Marketing, Director of Development, and Director of Artistic Planning and Operations (renamed from General Manager) vacant. The latter three are key positions responsible for product development (Artistic), earned revenue (Marketing), and unearned revenue (Development).

The second issue to arise was the delay in hiring for the vacant positions. Because the LPO staff was roughly one-fourth new during the 2011 -2012 Season, the need for a quick and effective leadership transition could not to be overstated. Specifically, the position of Director of Artistic Planning and Operations was left vacant until mid-November 2011. The selection of the Director is an important decision which requires adequate thought, but the decision was delayed until nearly the middle of the season. While there is value in “new blood,” this position requires substantial amount of transition time for a new hire and the delay added to the already significant workload of the Operations Manager and other key personnel.

The decision, or rather indecision, on filling the vacated positions caused work to amass and created undue stress for other staff members. Paul Light, a Senior Fellow at the Brookings Institute, states, “nonprofit employees to be highly motivated, hardworking, and deeply committed”, but also “nonprofit employees experience high levels of stress and burn out, and report that their organizations do not provide enough training and staff to succeed” (The Content of Their Character: The State of the Nonprofit Workforce). It is important to note that the stress felt by the LPO staff members is not unusual within the non-profit workforce, but the delayed hiring decisions have added to a sense of stress and burnout. The LPO staff has passion for the organizational mission, but it will be difficult to maintain that passion if relief is not provided soon.

II.

Indistinct Job Responsibilities Between Director of Artistic Planning & Operations and Operations Manager

Another issue was the indistinct job responsibilities between positions of the newly created Director of Artistic Planning and Operations and the Operation Manager.

Historically, the General Manager was tasked with all artistic planning and the Operations Manager served as supervisor for all decisions regarding logistics and production. By this arrangement, the General Manager and the Operations Manager often worked together to fulfill the artistic and logistic goals for each event.

Presently, the Managing Director oversees both positions yet has not set clear job responsibilities. Based on the LPO Organizational Chart, the Director of Artistic Planning and Operations is placed on the same tier as the Director of Marketing and Director of Development, and Director of Education. But without greater clarity between the roles, it is difficult to know where the duty of one position ends and the other begins. This has created confusion for artist agents, vendors, LPO staff members, and musicians.

III.

Undue Expenses and Personnel Strain from Out-of-Town Musician Extras

Other issues troubling the LPO are the number of extras required for its programming, the reliance upon out-of-town extra musicians, and stretched staff with duties and inflated costs resulting from hiring out-of-town extra musicians.

Much of the reasoning for hiring extra musicians stems from programming works which require instrumental forces larger than the LPO's core complement. The selection of works which do not match the LPO's capacity drives the problem of hiring the high number of musician extras. The use of extras increases the cost of each concert where the programming needs exceed the number of LPO musicians. With an LPO complement of sixty-seven full-time musicians, is there not a suitable amount of repertoire for an LPO-sized orchestra without requiring a hefty number of extra musicians? The scale of recent LPO programming may be working against the organization's financial best interests.

Besides concerns about the size of works, the reliance upon out-of-town musician extras as opposed to regional or local is another questionable practice. There is a perception among the musicians that a very limited number of qualified musicians exist within the New Orleans area, thus requiring the LPO to search elsewhere for capable musicians. There have been recent cases where the travel costs of an extra musician is greater than the amount he or she is paid. I do not know by what standards a musician is deemed qualified to perform with the LPO, but are there so few qualified musicians around the New Orleans area to necessitate flying in out-of-town musician extras?

The process of finding extra musicians is laborious and begins with the Orchestra Personnel Manager. When a particular concert program requires additional musicians, the Orchestra Personnel Manager (“OPM”) must seek out enough competent musicians to meet the needs of the conductor. When this happens, the Orchestra Personnel Manager consults the instrument section leaders (i.e. Principal Viola) for advice on musicians that can perform at a satisfactory level. Commonly, the recommended musicians are friends and colleagues of the section leaders who do not reside in or near Southern Louisiana. Because of this, the LPO is charged with the task and costs of arranging and purchasing airfare and finding accommodations for any incoming extra musicians. Though it is normal in the industry for the OPM to book flights and accommodations for the extra musicians, at the LPO once the extra musicians have been approved by the section leader, the Orchestra Personnel Manager provides the Operations Manager with contact information for each extra musician and the Operations Manager arranges airfare and lodging accommodations.

While it is admirable to stage larger orchestral works such as Mahler Symphonies, much of the logistical work required is unreasonably placed with the Operations Manager. The opportunity cost of saddling the Operations Manager with this duty is large enough to make this arrangement a detriment to the organization as a whole. There are many other, more pressing job responsibilities such as stage crew payroll, guest artist arrangements, venue rental payments, etc. The result is an unreasonable increase in duties for the Operation Manager when in fact, the duty should reside solely with the Orchestra Personnel Manager.

Finally, the frequent use of these out-of-town musicians causes an added expense which lowers from the profit margin of each concert for which these extra musicians are hired and adds to the organization's annual deficit. Aside from the fees to be paid to the extra musicians, the additional expenses of airfare for each extra musician traveling from distant cities are by far the largest expense (See Appendix F). Since the musicians have a unique presence on both the Board and the Concert Committee, and all final budget decisions are made by the Board and concert programming decisions must be approved by the appointed musicians of the Concert Committee (See Appendix A: p. 10), it is unclear why the LPO Board and senior management seem unaware of the negative impact of extra musician expenses on the LPO'S bottom line.

IV.

Guest Artist Fees & Expenses Too Excessive

While guest artist quality and artistic merit are of paramount importance to the concert product of the LPO, it is difficult to reconcile reason with practice when the artistic choice of instrumental soloists with their associated fees and expenses are too excessive for the LPO. Often the LPO engages guest artists from a few high-end artist management agencies (i.e. Opus 3, Columbia, etc.); yet comparable guest artists are available for lower fees. Furthermore, the LPO has had guest artists from foreign countries which incur additional expenses that a domestic soloist of a similar caliber would not incur. Case in point, the choice of Spanish Cello soloist, Asier Polo, to play Tchaikovsky's "Variations on a Rococo Theme" in January 2012 adds the expense of an international airfare of \$1,500 plus the same airfare amount for a seat holding his cello. This is a peculiar choice that most LPO musicians and staff find hard to understand since many talented cellists reside in the United States and would not incur as many arbitrary expenses as foreign artists. This has led to frustration from most both the LPO staff and musicians.

Opportunities

I.

Build Brand Awareness through Artistic Collaborations

Through artistic collaborations with notable local music artists, the LPO can create new, innovative programming utilizing these collaborations to further demonstrate its commitment and relevancy to the local community. New Orleans has a long history of rich musical talent from the days of Louis Armstrong to the most recent rise of musical talents such as Troy Andrews (a.k.a Trombone Shorty) and Kermit Ruffins. Many of these musicians have a local following which may reflect a different market segment than that of the LPO. Although the LPO continues to grow its reach throughout the State of Louisiana, most of its present resources and programming are based around the greater New Orleans area. This presents a unique opportunity for the LPO to build brand awareness and increase its visibility while reaching new members of the local community. According to notable fundraiser Simone Joyaux in *Strategic Fund Development*, an organization's relevance to the community significantly affects its ability to fundraise (57). Her words provide insight and further the case for the unique opportunities artistic collaborations can make for the LPO.

II.

Provide Chamber Music Concerts

Most of the concerts produced by the LPO use the instrumental forces of a symphony orchestra, yet no present LPO concerts are based on the smaller, more intimate setting and vast repertoire of chamber music. The expense for producing a chamber music concert is less than that of producing a symphony orchestra concert.

The LPO musicians are required to attend a maximum of nine services per season week. A service may consist of a rehearsal or concert. Since the musicians are paid whether or not they provide a service, the LPO can have multiple separate chamber ensembles which rehearse and perform in the same week at separate locations for a cost similar to one symphonic concert. Also, on average the LPO must spend at least an additional \$1,350 to add extra staging platforms at three of its four performance venues (First Baptist New Orleans, First Baptist Covington, and First Baptist Kenner) to fit all the musicians on stage; a cost that would not be required for chamber music concerts.

Many of the musicians have received training and have a desire to perform chamber music in addition to symphonic literature. Offering occasional chamber music concerts will give individual musicians a better sense of musical satisfaction, and provide the community with another classical performance form with its own rich history and repertoire.

III.

Increase Market Exposure Through Streaming and Webcasting Concerts

Perhaps one of the more innovative of the recent ventures major orchestras (i.e. New York Philharmonic, Los Angeles Philharmonic, etc.) have undertaken is increasing their market reach both locally and nationally through streaming and webcasting concerts. The major orchestras possess international reputations for high quality productions and have a larger market reach than the LPO. But streaming and webcasting a few concerts are not necessarily beyond the means of the LPO. There are many potential concert goers who may live too far away from the greater New Orleans area to visit for a concert. This equates to missed market exposure for the LPO within its own state.

Being named the Louisiana Philharmonic Orchestra aptly applies to the importance of reaching further outside the Greater New Orleans area and throughout Louisiana. Streaming and webcasting concerts through the LPO website will increase website visits by new and returning patrons.

IV.

Strengthen Relationships with Other Local Organizations

Presently, the LPO maintains a strong relationship with the New Orleans Opera Association since the LPO serves as the orchestra for each staged production. This relationship benefits both parties while serving the local community. There exist more

relationship opportunities for the LPO to explore. One such prospect is one of the largest festivals in New Orleans, *The Jazz and Heritage Festival* or *Jazz Fest*, presented by The Jazz and Heritage Foundation. The LPO does not normally perform as heavily during the two week period of Jazz Fest because of the expectation that audiences will choose Jazz Fest over LPO performances. However, this presents an opportunity for the LPO as there is a multitude of jazz pieces written with orchestra included (i.e. Duke Ellington). The LPO can begin building a relationship with the Jazz and Heritage Foundation by offering to perform along with a local Jazz artist as a headlining attraction. This will work to benefit the LPO by increasing its visibility and further solidifying its ties to the New Orleans community and many of the great organizations that support its unique contribution to music and culture.

Threats

I.

Small Number of Large Corporations in Area

The LPO faces a challenge similar to that faced by many of the nonprofit organizations in the greater New Orleans area: a small number of large corporations which have either major ties or headquarters in the city.

Additionally, in the current economic climate many companies have adjusted their funding amounts to reflect downturns in their budgets and devaluation of corporate assets. The LPO has begun to experience this trend among some of its largest

corporate donors. For the 2011-2012 Season, for example, American Airlines has decreased its flight voucher sponsorship from twenty-six vouchers to fourteen vouchers. The LPO relies heavily on flight vouchers to reduce the cost of airfare for many of the guest artists, marketing consultants, and extra musicians.

II.

Third Fiscal Year Ending in Budget Deficit

For at least the past three fiscal years, the LPO has ended its seasons with budget deficits. Last fiscal year, the LPO began its 2010-2011 Season with an operating budget of \$4.4 million, but ended with a deficit of \$654,367. The 2011-2012 Season operating budget was set for \$4.3 million and will end with a projected deficit of \$500,000.

As with many other New Orleans based nonprofit organizations, the LPO was financially devastated by Hurricane Katrina in 2005 and has not yet fully reestablished its financial footing. The orchestra lost its concert venue, much of its corporate and municipal support, and over two-thirds of its patron base. Since its primary concert venue is yet to be repaired, the LPO has incurred the increased costs of moving from venue to venue throughout the concert season. Also, the population of New Orleans and its surrounding areas has been slow to return to pre-Katrina level. These factors result in lower attendance and decreased funding support from LPO patrons and donors.

Municipal support has begun to lessen as well. Most recently, the City of New Orleans has rescinded a major grant awarded to the LPO in the 2011-2012 Season amounting to the sum of \$400,000.

On the plus side, other resources of fiscal support have begun to surface and in some cases become reality. The Mellon Foundation recently awarded the LPO a grant amounting to \$750,000 over three years (See Appendix E). Since a distinguished foundation like Mellon has awarded a grant to the LPO, this may act to validate the LPO among other foundations who may consequently start funding it.

III.

Lacking an *Integrated Media Agreement (IMA)* between Musicians and Organization

Reaching new patrons and staying relevant is becoming increasingly difficult for orchestras, but the use of integrated media is a clear way to expand beyond the doors of the concert hall. Many orchestras around the United States have utilized integrated media to increase the marketing reach of their brands beyond traditional models. Larger orchestras such as the Los Angeles Philharmonic and the Chicago Symphony have launched projects incorporating video, audio, live event, and web based components which have had a great impact for the organizations. Both nationally and within their respective areas, these orchestras continue to reach many new and returning patrons while demonstrating a bold step into the Twenty-First Century.

Although the LPO may not have as large a patron base and budget as the above orchestras, it still has similar needs and faces many of the same challenges. One major obstacle blocking the exploitation of integrated media is the absence of an agreement of terms between the organization as an entity and the musicians as part of a trade union. In order for the LPO to take advantage of the benefits stemming from integrated media it is vital for both parties (entity and musicians) to ratify an integrated media agreement (or IMA) clarifying issues surrounding the use of integrated media such as usage, rights, quality standards, and musician compensation.

Chapter Five

Intern Recommendations

During my time at the LPO, I have found the staff to be professional, courteous, and devoted to its organizational mission. The quality of product has remained at a relatively high level throughout my tenure as has the production capability of the staff. The LPO staff management remains well intentioned. However, there have recently been several missteps on the part of senior management that have disrupted the efficacy of the staff as a whole. These mistakes include poor overall communication between senior management and staff members which has resulted in low morale.

Often poor communication between senior management and staff regarding major projects, job responsibilities, and the absence of staff performance feedback resulted in confusion and frustration among staff members. Additionally, the communication between departments was adversely affected as policies and project initiatives were summarily executed before all participating staff had any chance to voice their concerns and assess possible cross-departmental difficulties.

For example, during my internship the LPO in partnership with Louisiana State University's College of Music and Dramatic Arts (CMDA) was awarded a three-year grant from The Andrew W. Mellon Foundation. The express purpose of the grant is "the creation of technologically advanced music content for broader technological transmission" (See Appendix E: p.2). The scope of this multi-year project is massive. While requiring substantial production and planning from the LPO alone, this grant also

states the LPO must ensure and facilitate all joint production efforts to be coordinated with CMDA. Many of the grant's stipulations have not been met within the required timeframe. For example, the grant states that the LPO should "identify twelve LSU students to serve as technology assistants for performance activities" which did not take place (See Appendix E: p. 3). There are no present plans nor any specified responsibilities for any of the suggested LSU students.

Additionally, no specific details regarding the implication of the project were included in the proposal or discussed outside of the development and grant writing offices. The production staff was not adequately included in the project design and grant writing process. This caused many logistical problems after the grant was awarded such as connectivity problems at both first year venues (St. Louis Cathedral and Champions Square). This may affect future portions of the multiyear grant project. Large projects, for which grants are sought, should be discussed with production staff before any final grant project proposals are submitted to ensure future grant compliance. It is recommended that more effective channels of communication be established.

A second area of significant concern is the manner in which replacement of departing staff was handled. As previously stated, many senior level positions were vacated during the beginning of the 2011 – 2012 Season. While the Director of Marketing, Director of Development, and Director of Artistic Planning and Operations positions were left unoccupied for varying amounts of time, the latter two were unoccupied for three months. It is important to note that these three positions have the greatest impact on raising revenue for the organization. Vacancies during such an

important time in the season left many of the job responsibilities normally associated with these senior level positions to other members of the staff. The resulting increased workload for other staff members created an atmosphere of added stress, burnout, and frustration. During this time the bulk of the long-term development work was delayed until mid-season. Also, much of the future season planning and production work was significantly delayed until after mid-season. The absence of key personnel hindered many long-term planning opportunities.

On the subject of nonprofit staffing and employee performance, Paul C. Light asks, “How can they [nonprofit staff] sustain high performance when almost half say their organization only sometimes or rarely provides enough employees to do their job well? How can they sustain it when half describe their organization’s hiring process as slow...? (Light, “Sustaining Nonprofit Performance” 7).

I recommend that a maximum time between position vacancy and position occupancy without temporary relief being provided, and as noted above there be clearer communications with staff as to what can be expected.

A third area of concern has to do with lack of clarity in staff structural revision. In the new structure, the Director of Artistic Planning and Operations position and Operations Manager position possess overlapping responsibilities. This has resulted in a vague understanding of where one position’s responsibilities end and the other’s begin. Many of the concert productions became more convoluted due to both positions duplicating work. I recommend clarifying that all planning responsibilities and final production decisions will reside with the Director of Artistic Planning and Operations

while all concert logistics responsibilities reside with the Operations Manager. Moreover, renaming the Director of Artistic Planning and Operations to the “Director of Artistic Planning and Production” will help ensure that the distinction between positions is clearer and that the Director retains the final decision on productions.

Another problematic structural issue has been between the Orchestra Personnel Manager and the Operations Manager position. The task of identifying all extra and substitute musicians for any orchestra, normally within the Orchestra Personnel Manager’s domain, is arduous and time-consuming. In the LPO, the Orchestra Personnel Manager also serves as a musician and supplements his relatively low income with outside work. The workload for a LPO musician is too great to simultaneously juggle the rigors of maintaining high musicianship, teaching, and the laborious tasks of the Orchestra Personnel Manager, and the present Orchestra Personnel Manager has passed on all travel logistics to the Operations Manager. This has been disastrous and has restricted the amount of work the Operations Manager can accomplish.

My recommendations are: A) that the Orchestra Personnel Manager be a full-time staff member who is not also an LPO musician, and B) that the issue of identifying extra/substitute musicians and the subsequent travel should be the responsibility of the Orchestra Personnel Manager.

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Appendices

Appendix A.

The Louisiana Philharmonic Orchestra Corporate

Bylaws; Operating Rules and Procedures



LOUISIANA PHILHARMONIC
ORCHESTRA
CARLOS MIGUEL PRIETO, MUSIC DIRECTOR

Bylaws

Operating Rules and Procedures

Fiscal Policies and Procedures

June 30, 2010

**Additional Policies as
of September 21, 2010**

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Corporate Bylaws
of
The Louisiana Philharmonic Orchestra

Preamble

The Louisiana Philharmonic Orchestra is a full-time professional orchestra providing cultural leadership and through its presentation of the highest quality symphonic music and educational programs, enriching individual listeners, building community partnerships, and enhancing the cultural vitality of the community. This is accomplished through a collaborative effort among its performing musicians, community representatives, and professional staff. The musicians who are members of the orchestra corporation retain final oversight of all policies and governance.

Definitions

"LPO" or the word "corporation" refers to The Louisiana Philharmonic Orchestra, a Louisiana nonprofit corporation.

The word "orchestra" (spelled with a lower-case "o") refers to the ensemble of musicians who perform. The ensemble comprises (a) musicians playing full-time under a contract with tenure, (b) musicians playing full-time under a contract who, although not having tenure, are "probationary," that is, aspire to be awarded tenure, (c) non-tenure-track ("substitute" or "temporary") musicians playing full-time under a contract, and (d) extra or part-time (per-service) musicians.

The word "Orchestra" (spelled with an upper-case "O") is used only in the formal name of or to refer to the corporation, in the title of the President of the Orchestra (corporation), and for marketing purposes.

The term "season" refers to the period during which the orchestra is actively engaged in concert production (including any paid vacation periods or days off) which is contained in a single fiscal year of the corporation and during which full-time musicians under contract are paid a regular weekly salary based on share.

The term "share" refers to the base annual cash compensation of a full-time tenured section musician without respect to titled position or longevity payments.

The term "the Local" refers to Local 174-496 of the American Federation of Musicians.

Corporate Bylaws

1 Members of the corporation

1.1 A person shall be a member of the corporation if:

1.1.1 the Personnel Committee of the corporation (see section 5.2 below) has recommended to the Personnel Manager that the person be offered a contract (in accordance with the Operating Rules and Procedures of the corporation) as a full-time musician for the orchestra for the current season or, in the case of tenured persons, for an indefinite number of seasons; and

1.1.2 the person's compensation is based on a share.

1.2 A person shall cease to be a member of the corporation

1.2.1 at the end of a season if

1.2.1.1 such person shall decline an offer of employment from the corporation for the following season and shall not have received a leave of absence, or such person, if tenured, has notified the corporation of an intent to resign that tenured position, or

1.2.1.2 such person is a probationary musician whose contract is not renewed as provided in the Operating Rules and Procedures;

or

1.2.2 at any time during a season if

1.2.2.1 such person resigns his or her membership effective immediately,

or

1.2.2.2 such person fails to comply with the reasonable and lawful requirements stated in the Operating Rules and Procedures made by the corporation for the governance of its members and is terminated from membership in accordance with those Operating Rules and Procedures.

1.3 Membership shall not be transferable nor heritable.

1.4 Fiscal relationships between the corporation and its members

1.4.1 The corporation may levy dues or assessments, or both, upon its members if authorized by a two-thirds vote of the members.

1.4.2 A member of the corporation shall not be liable personally for any obligation of the corporation.

1.4.3 The corporation may lend money to a member only if authorized by the Finance Committee and the Musicians' Committee.

1.4.4 A member of the corporation who receives any unlawful distribution of the corporation's assets shall be liable to the corporation or to its creditors, or to both, in an amount not exceeding the unlawful amount so received by that member.

1.4.5 The annual operating budget of the corporation as approved by the corporation's Board of Trustees shall be presented to the members of the corporation at the Fall Corporate Meeting (see section 2 below).

1.5 The members of the corporation may meet from time to time to consider and act on affairs of the corporation; these meetings are subject to requirements of notice and quorum and are referred to as "Corporate Meetings" as described in section 2 below. The full-time musicians of the orchestra may meet from time to time to consider and act on affairs of the orchestra; such a meeting is referred to as an "orchestra meeting" as described in section 4 below and does not satisfy the procedural requirements that would allow corporate action to be taken.

1.6 Any member of the corporation may and is encouraged to seek appointment to any committee specified in sections 5.4 and 10.5 through 10.8 below by notifying the committee chair or co-chairs of the member's interest.

2 Corporate Meetings--The members of the corporation together with its Trustees meet from time to time to consider and act on affairs of the corporation. This includes matters pertaining to the selection and retention (other than of Life Trustees) of Community Trustees (see section 6 below), the content of the orchestra's Operating Rules and Procedures (see section 15 below), the content of these bylaws (see section 17 below), and all other matters of corporate policy.

2.1 The annual meeting of the members of the corporation shall be held during April or May of each season. The date for this Annual Corporate Meeting shall be fixed by the Board of Trustees not later than thirty days prior to the meeting. The purpose of

this meeting is to conclude the election of Community Trustees, and to transact such other business as may come before the meeting.

2.2 The fall meeting of the members of the corporation shall be held during November of each season. The date for this Fall Corporate Meeting shall be fixed by the Board of Trustees not later than thirty days prior to the meeting. The purpose of this meeting is to receive the external audit of the prior season and the approved budget for the current season, and to transact such other business as may come before the meeting.

2.3 A special meeting of the members of the corporation may be called at any time by the Board of Trustees, the Presidents' Committee, the Musicians' Committee, the President of the Orchestra, or upon the written request of any ten members of the corporation, which request shall state the purpose of the meeting. Elections of individuals to the Musicians', Concert, and Personnel Committees shall be by the process set forth in section 3 below outside of Corporate Meetings.

2.4 Community Trustees may attend any Corporate Meeting except a meeting or that portion of a meeting noticed for the discussion of the process for the award of tenure to members of the corporation.

2.5 Notices

2.5.1 The person or persons calling a special Corporate Meeting shall cause written notice of the time, place, and purpose of the meeting to be given to all members of the corporation at least seven days (except as otherwise provided below in section 2.5.2) and not more than thirty days prior to the day fixed for the meeting.

2.5.2 Notice shall be given at least fifteen days prior to any meeting called

2.5.2.1 to amend these bylaws, the Orchestra's Operating Rules and Procedures;

2.5.2.2 to elect a person to fill a Community Trustee vacancy; or

2.5.2.3 to remove a Community Trustee other than a Life Trustee, or a member of the Musicians', Concert, or Personnel Committees.

2.5.3 Notice shall be deemed to have been given to, or waived by, all members of the corporation present or represented at any meeting, except any member of the corporation who, at the beginning of the meeting objects to the transaction of any business because the meeting is not lawfully called or convened.

2.6 Quorums and transaction of business

2.6.1 The presence in person or by proxy of a majority of the members of the corporation shall constitute a quorum for Corporate Meetings to transact business.

2.6.2 Once a quorum exists, the members of the corporation present may transact business and may continue to do business until adjournment, notwithstanding either the withdrawal of enough members to leave less than a quorum or the refusal of any member present to vote.

2.7 Voting

2.7.1 Except as otherwise provided in the articles of incorporation, these bylaws, or the Louisiana Nonprofit Corporation Law, a majority of the votes actually cast shall decide any matter properly brought before a Corporate Meeting.

2.7.2 Community Trustees nominated for fixed terms shall be elected by a plurality of the votes cast, that is, the number of candidates equal to the number of positions to be filled who receive the most votes shall be elected. Life Trustees shall be elected upon receiving affirmative votes of a majority of the members of the corporation.

2.7.3 Each member of the corporation shall be entitled to one vote (or, in the case of the elections of fixed-term Community Trustees, one vote for each position to be filled) on all issues submitted at a Corporate Meeting for a vote of the members of the corporation, except that a member of the corporation described in section 1.2.1 above (a member of the corporation terminating at the end of the season) shall not vote in any elections.

2.7.4 At the request of any member of the corporation, any matter shall be voted on by secret ballot.

2.7.5 A member of the corporation shall have the right to cast his/her vote by proxy on any matter other than an election. Each proxy must be duly authorized in writing, signed by the proxy-giving member, and filed with the Secretary of the corporation at or before the meeting. A proxy shall be revocable at the will of the member who gave the proxy.

2.7.6 Elections for Community Trustees and for members of the Musicians' Committee shall be by secret ballot using the process described in section 14 of the Operating Rules and Procedures, and shall take place over four consecutive calendar days, concluding at the annual Corporate Meeting or a special Corporate Meeting called for that purpose.

2.8 Conduct of meetings

2.8.1 The President of the Orchestra, or in his/her absence, a member of the corporation designated in writing by the President, shall preside at Corporate Meetings.

2.8.2 Corporate Meetings shall be conducted in accordance with Robert's Rules of Order.

3 Elections outside Corporate Meetings

3.1 Regular elections for members of the Concert and Personnel Committees, musician members of the Artistic Partnership Committee, and special elections for filling vacancies on these committees shall be conducted outside of Corporate Meetings.

3.2 Nominations for the elections set forth in section 3.1 above may be opened by announcement by the President of the Orchestra or the Secretary of the corporation at any orchestra meeting, rehearsal of the orchestra, or Corporate Meeting. Nominations shall remain open for three days subsequent to such announcement, during which time any member of the corporation may submit written nominations to the President or the Secretary.

3.4 Within seven days following the close of nominations, the Secretary shall announce at an orchestra meeting, a rehearsal of the orchestra, or a Corporate Meeting, the beginning and ending dates and times of a four-day period for the casting of votes by members of the corporation using the process described in section 14 of the Operating Rules and Procedures.

4 Meetings of the orchestra

4.1 A meeting of the orchestra (also known as an "orchestra meeting") may occur without formal notice and, subject to the quorum requirements in section 4.2 below, may transact day-to-day business affecting the orchestra such as authorizing ad hoc variations to the Operating Rules and Procedures of the orchestra as, for example, permitting extra services in a given week. Corporate action may *not* be taken at an orchestra meeting unless notice has been given in accordance with section 2.4 above and a quorum is present in accordance with section 2.5.1 above.

4.2 The quorum for an orchestra meeting is one-fourth of the members of the corporation.

5 Committees of the corporation—Members of these committees must be of members of the corporation and, if specified in these bylaws, the Music Director. Unless authorized by the Musicians' Committee, no person may chair more than one committee of the corporation, and no member of the corporation having a paid administrative staff position may chair any committee of the corporation.

5.1 The Musicians' Committee

5.1.1 The Musicians' Committee shall consist of eleven members of the corporation:

5.1.1.1 the chair of the Personnel Committee (see section 5.2 below);

5.1.1.2 the chair of the Concert Committee (see section 5.3 below);

5.1.1.3 the chair of the Education Committee (see section 5.4 below);

and

5.1.1.4 eight additional persons selected in accordance with sections 5.1.6, 5.1.7, and 5.1.8 below.

5.1.2 Terms of service

5.1.2.1 The persons designated in sections 5.1.2.1, 5.1.2.2, and 5.1.2.3 above shall be members of the Musicians' Committee for terms coincident with their terms in their respective positions.

5.1.2.2 All other members of the Musicians' Committee shall hold office from July 1st until June 30th of the following second year or, in the event of their departure from the Committee prior to the normal expiration of their term, until their successors are elected and assume their duties.

5.1.3 Only members of the corporation with tenure are eligible to serve as members of the Musicians' Committee. The Personnel Manager shall not be eligible to serve on the Musicians' Committee.

5.1.4 The members of the Musicians' Committee shall be members of the Board of Trustees of the corporation.

5.1.5 Of the eight members of the Musicians' Committee established in section 5.1.1.4 above, four members of the Musicians' Committee shall be elected in even-numbered years and four members elected in odd-numbered years. There shall

be no limit on the number of consecutive terms to which an individual can be elected to the Musicians' Committee.

5.1.6 Regular elections for the Musicians' Committee and elections to fill vacancies on the Musicians' Committee shall be conducted in accordance with section 2.6.6 above. Nominations for the Musicians' Committee shall follow the process in section 3.2 above.

5.1.7 The members of the corporation, by a vote of a majority of all such members, may, at any special Corporate Meeting called for the purpose, remove any one or more of the members of the Musicians' Committee, notwithstanding that his, her, or their terms of office may not have expired.

5.1.8 Each year on or before June 30th, the Musicians' Committee shall select one of its number to be the President of the Orchestra.

5.1.9 The Musicians' Committee may meet in accordance with its own rules and is responsible for the management of Corporate Meetings, orchestra meetings, elections as described in sections 2.6.6 and 3 above, and the interpretation and waiving of sections of the Operating Rules and Procedures other than 1 through 3.

5.2 Personnel Committee

5.2.1 The purpose of the Personnel Committee is to ensure that the musicians performing in the orchestra are of the highest artistic quality and that personnel policies are applied in a fair and consistent manner. Specifically, the Personnel Committee oversees the processes set forth in the Operating Rules related to

5.2.1.1 auditions, contracts, tenure, leave requests, and discipline for full-time musicians;

5.2.1.2 contracting for substitute and extra musicians.

The Personnel Committee also carries out such other responsibilities given it in these Bylaws and in the Operating Rules.

5.2.2 All matters dealt with by the Personnel Committee shall be held in strict confidence. This includes the content of all deliberations and all actual vote tallies. Minutes of each meeting of the Personnel Committee shall be taken by the secretary of the Committee and maintained in the Orchestra's confidential personnel files. No individual member of the Personnel Committee may speak for the Committee without

the prior consent of a majority of the Committee members at an official meeting of the Personnel Committee.

5.2.3 The Personnel Committee shall consist of ten tenured members of the corporation elected by members of the corporation using the nomination and voting procedures set forth in section 3 above. These members of the Personnel Committee shall be elected annually prior to the end of the season and shall serve for a term of one year commencing July 1st following their election. The unexpired portion of any vacancy in the Personnel Committee shall be filled in a special election by the members of the corporation using the nomination and voting procedures set forth in section 3 above. In addition, the Music Director and the Personnel Manager are members of the Personnel Committee.

5.2.4 Immediately following the annual election for new Personnel Committee members, the new Committee shall choose a chair from among its members. Neither the Music Director nor the Personnel Manager may serve as chair.

5.2.5 No person on the Personnel Committee other than a person designated in sections 5.1.1.1, 5.1.1.2, or 5.1.1.3 above may serve simultaneously on the Musicians' Committee.

5.2.6 Each elected member of the Personnel Committee shall have one vote. The Personnel Manager may not vote. (However, the Personnel Manager may vote as an orchestra member if included as an eligible musician when the Personnel Committee is augmented by additional musicians for audition or musician review purposes.) The Music Director votes only when the Personnel Committee is convened for the purpose of auditioning prospective members of the orchestra or for the purpose of considering the award of tenure to an existing member of the orchestra. In these matters the Music Director shall have a number of votes equal to one-third of the total number of votes cast by others on each single issue. In all matters before the Personnel Committee, a decision shall require a majority of all votes actually cast. In the event of a tie vote, the chair of the Personnel Committee shall have a second vote. When the Personnel Committee is augmented by other musicians to function as an Audition Committee or as a Review Committee, each additional musician shall have one vote.

5.2.7 Prior to implementing any decision adverse to a member of the corporation, the Personnel Committee shall obtain the formal concurrence of the Human Resources Committee (which may also consult with the Legal Committee).

5.2.8 The Personnel Committee shall communicate to the Board of Trustees no later than March 15th of each year its recommendation as to the maximum number orchestra members for the following season.

5.2.9 The Personnel Committee shall function within the constraints of orchestra size established by the Board of Trustees in accordance with section 7.3.2 below. Should the Personnel Committee desire to make personnel decisions that would cause the orchestra to exceed the approved size, it must advise the Finance Committee of the desired alteration. The Finance Committee will make a recommendation to the Board of Trustees which must approve the desired alteration.

5.2.10 The chair of the Personnel Committee shall prepare a written report on the activities of the Personnel Committee to be distributed to the Board of Trustees prior to each of its meetings.

5.3 Concert Committee

5.3.1 The purpose of the Concert Committee is to plan and coordinate the artistic content of all musical performances of the LPO. This includes the selection of pieces to be played in each performance, the selection of guest artists and guest conductors, and the number of rehearsals required for each performance, all in accordance with the Operating Rules and Procedures and the budgetary limits and the season structure approved by the Board of Trustees. The administrative staff will negotiate all fees for such services in consultation with the Concert Committee. In performing these duties, the Concert Committee shall consult with the Board of Trustees, the President of the Orchestra, the co-chairs of the Finance and Development Committees, the Director, the President of the Symphony Volunteers, Inc., and the Chair of the LPO Advisory Board as appropriate.

5.3.2 The Concert Committee shall consist of eleven members as follows:

5.3.2.1 the Librarian, an ex-officio, voting member;

5.3.2.2 the Music Director, an ex-officio, voting member;

5.3.2.3 the Managing Director, an ex-officio, non-voting member;

5.3.2.4 the Personnel Manager, an ex-officio, voting member;

5.3.2.5 the Operations Manager/Artistic Administrator, an ex-officio, non-voting member; and

5.3.2.6 six elected members of the corporation as voting members of the committee. The Librarian and the Personnel Manager may not serve as elected members of the Concert Committee.

5.3.3 The terms of the six elected members of the Concert Committee shall be for two years with three elected each January using the nominating and election procedures set forth in section 3 above. The terms of the ex-officio members shall coincide with their terms in their respective positions. The unexpired portion of any vacancy in the Concert Committee shall be filled by a special election by the members of the corporation using the nomination and voting procedures set forth in section 3 above.

5.3.4 In January following the annual election for new Concert Committee members, the new Committee shall choose a chair or co-chairs from among its voting members except that neither the Music Director nor the Personnel Manager may serve as chair.

5.3.5 The Concert Committee shall respect all provisions of any contracts between the Orchestra and its Music Director and between the Orchestra and other artistic directors relating to programming, selection of guest artists and guest conductors, and any changes to these. The Managing Director shall ensure that the Artistic Administrator and the chair of the Concert Committee have copies of the relevant parts of all such contracts.

5.3.6 The Concert Committee shall function within the financial constraints approved by the Board of Trustees based on the recommendation of the Finance Committee. Should the Concert Committee desire to engage in programming that would exceed those financial constraints, it must advise the Finance Committee of the desired additional expense. The Finance Committee will make a recommendation to the Board of Trustees which must approve the desired additional expense.

5.3.7 The Concert Committee shall function within the constraints of the season structure approved by the Board of Trustees based on the recommendation of the Product Development and Planning Committee. Should the Concert Committee desire to engage in programming that would alter that approved structure, it must advise the Product Development and Planning Committee of the desired alteration. The Product Development and Planning Committee will make a recommendation to the Board of Trustees which must approve the desired alteration.

5.3.8 The chair of the Concert Committee shall prepare a written report on the activities of the Concert Committee to be distributed to the Board of Trustees prior to each of its meetings.

5.3.9 The Concert Committee shall communicate to the Board of Trustees no later than March 15th of each year its recommendation as to the maximum number of full-time orchestra members for the following season.

5.3.10 The unexpired portion of any vacancy in the Concert Committee shall be filled by a special election by the members of the corporation using the nomination and voting procedures set forth in section 3 above.

5.4 Education Committee

5.4.1 The purpose of the Education Committee is to work collaboratively with education, development, and production staff in the creation of educational initiatives including those designed to elicit external funding, in the planning of programs to implement those initiatives, and in the assessment of the effectiveness of these programs.

5.4.2 The President of the Orchestra shall appoint each season a tenured member of the corporation not otherwise a member of the Musicians' Committee to chair the Education Committee. The Resident Conductor shall be a standing member of the Education Committee. Any member of the corporation may self-select to be a member of the Education Committee.

5.4.3 The Chair of the Education Committee shall prepare a written report on the activities of the Education Committee to be distributed to the Board of Trustees prior to each of its meetings.

5.5 Other Committees—The Musicians' Committee may establish such other committees of the corporation deemed necessary or appropriate for the conduct of the affairs of the LPO. The President of the Orchestra may appoint the members of each such committee established, and such members shall serve at the pleasure of the Musicians' Committee.

6 The Community Trustees—There shall be three kinds of Community Trustees, those elected to fixed terms by the members of the corporation, those serving as ex officio Community Trustees, and those elected as Life Trustees by the members of the corporation.

6.1 The Community Trustee shall include

6.1.1 up to twenty-two fixed-term trustees elected by members of the corporation after having been nominated in accordance with sections 6.4 and 6.5 below;

6.1.2 ex officio trustees as follows:

6.1.2.1 The Chair of each regional LPO Advisory Board, or if that person has been selected to be a fixed-term trustee, the Vice-Chair of that regional LPO Advisory Board; and

6.1.2.2 The President of the Symphony Volunteers, Inc., or if that person has been selected to be a fixed-term trustee, a Vice-President of the Symphony Volunteers, Inc. elected by the Symphony Volunteers, Inc.;

6.1.3 all Life Trustees elected by members of the corporation after having been nominated in accordance with sections 6.5 and 6.6 below. The Community Trustees—There shall be two kinds of Community Trustees, those serving fixed terms, and those elected as Life Trustees.

6.2 Terms of service

6.2.1 The persons designated in sections 6.2.1 and 6.2.2 above shall be Community Trustees for terms coincident with their terms in their respective positions.

6.2.2 The persons designated in section 6.2.3 above shall hold office from July 1st until June 30th of the following third year except as set forth in section 6.5 below.

6.2.3 There shall be no limit on the term of a Life Trustee.

6.3 No member of the corporation and no employee of the corporation may serve as a Community Trustee.

6.4 Of the Community Trustees referred to in section 6.2.3 above, no more than one-third of that number plus one shall be elected annually for three-year terms.

6.5 Once each year no later than March 1st the Governance Committee of the Board of Trustees described in section 10.2 below shall submit to the Board of Trustees the names of persons it recommends as nominees for full terms as Community Trustees. Persons so recommended become nominees for full terms upon the affirmative vote of a majority of the membership of the Board of Trustees. When Community Trustee vacancies exist, the President of the Board in consultation with the President of the Orchestra may name interim Community Trustees to serve through the following June 30th. Interim Community Trustees move through the process described in this section to become nominees for service beyond the interim appointment. No interim Life Trustee appointments may be made. Persons recommended by the Governance Committee for Life Trustees positions become nominees upon the affirmative vote of two-thirds of the membership of the Board of Trustees.

6.6 Life Trustee positions are reserved for persons who, through time, have demonstrated extraordinary dedication, support, and service to the orchestra and its activities. While designation as a Life Trustee is considered a singular honor, the intent is far more than honorific, and Life Trustees are expected to continue an active relationship with the Orchestra and to serve as voting members of the Board of Trustees. Once each year no later than March 1st the Governance Committee of the Board of Trustees may recommend to the full Board of Trustees one or more persons for Life Trustee, and the process set forth in section 6.6 above will then be followed.

7 The Board of Trustees

7.1 The affairs of the corporation shall be managed by the Board of Trustees.

7.2 Members of the Board of Trustees stand in a fiduciary relation to the corporation, and shall discharge the duties of their position in good faith, and with that diligence, care, judgment, and skill which ordinarily prudent persons would exercise under similar circumstances in like positions.

7.3 In addition to its traditional corporate legal/fiduciary responsibilities, the Board of Trustees has the primary responsibility for advancing and participating in appropriate fundraising activities on behalf of the corporation. The Board of Trustees also

7.3.1 establishes corporate policy and strategic direction, recognizing that these bylaws reserve to the members of the corporation various responsibilities for musician personnel and artistic decisions while the Board of Trustees retains fiduciary oversight of those personnel and artistic activities;

7.3.2 serves as the corporate audit committee as a committee of the whole;

7.3.3 adopts and monitors the corporate budget to include setting limits for various expenditure categories during the budgeting and planning processes;

7.3.4 establishes the maximum number of full-time members of the orchestra, subject to the review of that number at the annual Corporate Meeting. The Board of Trustees shall make its decision for the following season in March of each year after receiving formal recommendations submitted to the Board no later than each March 15th by the Personnel Committee, the Concert Committee, and the Finance Committee.

7.3.5 selects, evaluates, reviews, and determines retention of the Managing Director through a process it establishes (see section 12 below pertaining to the Managing Director).

7.3.6 with at least sixty days notice sets the April date of the Annual Corporate Meeting set forth in section 2.1 above, and the date of the November Fall Corporate Meeting set forth in section 2.2 above.

7.3.7 amends these bylaws in accordance with the provisions of section 17 below.

7.4 The Board of Trustees of the corporation shall consist of up to thirty-five voting members having specific terms, a number of voting life members, and two ex officio, non-voting members:

7.4.1 the members of the Musicians' Committee;

7.4.2 the Community Trustees;

7.4.3 the Managing Director, an ex officio, non-voting member; and

7.4.4 the Music Director, an ex officio, non-voting member.

7.5 Except for Life Trustees, the persons designated in section 7.4 above shall be members of the Board of Trustees for terms coincident with their terms in their respective positions.

7.6 Each second year on or before June 30th, the Board of Trustees shall select one of the Community Trustees other than a Life Trustee to be the President of the Board of Trustees for a term as set forth in section 8.5 below.

7.7 Meetings of the Board of Trustees

7.7.1 The Board of Trustees shall have no fewer than five regular meetings during each nine-month season.

7.7.2 Special meetings of the Board of Trustees may be called with two weeks written notice by its President or at the request of any three members of the Board of Trustees.

7.7.3 Any member of corporation may attend any meeting of the Board of Trustees, but may attend executive sessions of the Board of Trustees only by invitation. Members of the corporation may speak at meetings of the Board of Trustees either during the time set aside on the agenda for member input, or by invitation only during consideration of other agenda items. The Board of Trustees may invite any other person to attend any or all of its meetings or any portions thereof.

7.8 A majority of the voting members of the Board of Trustees shall be necessary to constitute a quorum for the transaction of business, and, except as specified in these bylaws, the acts of a majority of the members of the Board of Trustees having a vote who are present at a meeting at which a quorum is present shall be the acts of the Board.

7.9 Conduct of meetings

7.9.1 The President of the Board of Trustees or, in his/her absence, the President of the Orchestra, shall preside at meetings of the Board of Trustees.

7.9.2 Meetings of the Board of Trustees shall be conducted in accordance with Robert's Rules of Order.

7.10 Any action which may be taken at a meeting of the Board of Trustees may be taken by a consent in writing signed by all of the Trustees and filed with the proceedings of the Board of Trustees.

8 Officers of the corporation

8.1 The officers of the corporation shall be the President of the Orchestra, the President of the Board of Trustees, the Secretary, and the Treasurer. The Board of Trustees may elect such other officers as it may deem appropriate.

8.2 The President of the Orchestra shall be selected in accordance with section 5.1.9 above, and the President of the Board of Trustees shall be selected in accordance with section 7.6 above. Each season on or before June 30th, the Board of Trustees shall elect from its membership two persons to serve as Secretary and as Treasurer for terms as set forth in section 8.5 below.

8.3 Election or appointment of an officer shall not of itself create contract rights.

8.4 Any officer or agent may be removed by the Board of Trustees with or without cause at any time.

8.5 Officers who are Musician Trustees shall hold office from July 1st through June 30th of each year or until his or her successor is elected and assumes his or her duties. Officers who are Community Trustees shall hold office for two years from July 1st through June 30th of the second year or until his or her successor is elected and assumes his or her duties.

8.6 The President of the Orchestra shall chair all corporate and orchestra meetings, chair the Musicians' Committee, serve as co-chair of the Presidents' Committee (see section 10.1 below), and shall be the senior spokesperson for the orchestra and the corporation to external communities.

8.7 The President of the Board of Trustees shall chair meetings of the Board of Trustees, serve as co-chair of the Presidents' committee (see section 10.1 below), and represent the corporation.

8.8 The Secretary shall:

8.8.1 maintain the corporate minute book for all Corporate Meetings, meetings of the Board of Trustees, and meetings of the Presidents' Committee (see section 10.1 below);

8.8.2 see that all notices are given in accordance with law and these bylaws;

8.8.3 sign all corporate documents as required by law and regulation;

8.8.4 serve as a member of the Presidents' Committee (see section 10.1 below);

8.8.5 keep a register of the post office address of each Trustee which shall be furnished to the Secretary by such Trustee;

8.8.6 perform all of those duties specified in section 3 above and section 10 below;

8.8.7 not later than February 15th each year, ask members of the corporation to submit to the Secretary on or before March 1st names of candidates for positions as Community Trustees, with each name submitted accompanied by a statement from the person submitting the name stating whether the person named has agreed to accept a nomination if offered, and then to submit all such names to the Governance Committee see section 10.2 below); and

8.8.8 in general perform all duties incident to the office of Secretary and such other duties as from time to time may be assigned to him or her by the Board of Trustees, the President of the Orchestra, or the President of the Board of Trustees.

8.8.9 In the event the Secretary is not a member of the corporation, the President of the Orchestra shall appoint an assistant Secretary to serve under the

direction of the Secretary to perform all of those duties and such other duties required in connection with Corporate Meetings described above in section 2 of these bylaws.

8.9 The Treasurer shall:

8.9.1 have charge and custody of, and be responsible for, all funds and securities of the corporation;

8.9.2 sign all documents as required for corporate financial matters;

8.9.3 co-chair the Finance Committee (see section 10.5 below);

8.9.4 serve as a member of the Presidents' Committee (see section 10.1 below); and

8.9.5 in general perform all of the duties incident to the office of Treasurer and such other duties as from time to time may be assigned to him or her by the Board of Trustees, the President of the Orchestra, or the President of the Board of Trustees.

8.10 Officers stand in a fiduciary relation to the corporation, and shall discharge the duties of their position in good faith, and with that diligence, care, judgment, and skill which ordinarily prudent persons would exercise under similar circumstances in like positions.

9 Committees of the Board of Trustees—General

9.1 The Managing Director shall be an ex-officio, non-voting member of all committees of the Board of Trustees other than the Human Resources Committee and the Artistic Partnership Committee except when the latter is acting as a search committee (section 10.8.1.5 below).

9.2 Except for the Governance Committee and the Legal Committee, the committees specified in section 10 below shall be organized with two co-chairs. One co-chair shall be a musician and one co-chair shall be from the community. Where co-chairs are not otherwise specified, the President of the Orchestra shall appoint each committee's musician co-chair and the President of the Board of Trustees shall appoint each committee's community co-chair after consultation with appropriate members of the Board of Trustees and the Managing Director. Unless authorized by the Board of Trustees, no member of the corporation having a paid administrative staff position may co-chair any committee of the Board of Trustees. Where possible, one or both of the co-chairs of each committee will be members of the Board of Trustees. If one or both of the co-chairs of each committee cannot be members of the Board of Trustees, then

every effort shall be made to have a member of the Board of Trustees serve as a member of the respective committee.

9.3 Unless membership is otherwise specified in these bylaws, the two co-chairs of each committee, in consultation with the Managing Director, shall appoint the members of their committee from among those musicians and community members who have indicated an interest in serving on the committee. The Board of Trustees will solicit such indications of interest each year from the LPO Board, the Symphony Volunteers, Inc., purchasers of orchestra subscriptions, and other LPO supporters.

9.4 The co-chairs of each committee may establish subcommittees to execute the various functions of each committee.

9.5 Each standing committee shall report to the Board of Trustees at each month's meeting on the status of activities being handled by the committee. This report will be provided by the Board of Trustees' member of the committee or by a specially designated member of the committee as appropriate.

9.6 The various committees shall be supported by the LPO staff as determined by the Managing Director.

10 Specific Committees of the Board of Trustees

10.1 The Presidents' Committee

10.1.1 Should matters arise that require action by the Board of Trustees at times when it is not possible either to convene the Board of Trustees or to obtain a quorum for a meeting of the Board of Trustees, the President of the Orchestra and the President of the Board of Trustees, acting jointly, may convene the Presidents' Committee. Convening the Presidents' Committee requires reasonable notice be given to each of its members including a description of the specific matter requiring action. Any action taken by the Presidents' Committee shall be deemed to be the action of the Board of Trustees. Any action that materially relates to the fiduciary responsibilities of the Trustees shall be subject to ratification by the Board of Trustees at its next meeting. Minutes of all meetings of the Presidents' Committee shall be distributed to all Trustees.

10.1.2 When convened, the members of the Presidents' Committee stand in a fiduciary relation to the corporation, and shall discharge the duties of their position in good faith, and with that diligence, care, judgment, and skill which ordinarily prudent persons would exercise under similar circumstances in like positions.

10.1.3 The Presidents' Committee shall have ten voting members as follows:

10.1.3.1 the President of the Orchestra who will be one of the two co-chairs of the Presidents' Committee;

10.1.3.2 the President of the Board of Trustees who will be one of the two co-chairs of the Presidents' Committee;

10.1.3.3 the Secretary of the corporation;

10.1.3.4 the Treasurer of the corporation; and

10.1.3.5 six additional members elected by the Board of Trustees each year prior to June 30th for the following fiscal year such that the total number of members from the Musicians' Committee on the Presidents' Committee is five and the total number of Community Trustees on the Presidents' Committee is five.

10.1.4 A majority of the voting members of the Presidents' Committee shall be necessary to constitute a quorum for the transaction of business, and the acts of a majority of the voting members of the Presidents' Committee present at a meeting at which a quorum is present shall be the acts of the Presidents' Committee.

10.1.5 Conduct of meetings

10.1.5.1 The President of the Board of Trustees or, in his/her absence, the President of the Orchestra shall preside at meetings of the Presidents' Committee.

10.1.5.2 Meetings of the Presidents' Committee shall be conducted in accordance with Robert's Rules of Order.

10.1.6 Any action which may be taken at a meeting of the Presidents' Committee may be taken by a consent in writing signed by all of the Presidents' Committee members and filed with the proceedings of the Presidents' Committee.

10.2 The Governance Committee

10.2.1 The Governance Committee of the Board of Trustees has the responsibility for making an annual review of all governance documents under which the corporation operates, for making recommendations for changes to those documents, for interpreting the corporate bylaws for internal purposes, and for seeking persons to serve as Community Trustees.

10.2.2 The Governance Committee shall consist of the President of the Board of Trustees, the chair of each Advisory Board, the President of the Symphony Volunteers, Inc. (SVI), the President of the Orchestra, a number equal to the number of Advisory Board chairs of other members of the Musicians' Committee appointed by the President of the Board of Trustees, and one former President of the Orchestra not on the Musicians' Committee appointed by the current President of the Orchestra. The President of the Board of Trustees shall serve as the chair of this Governance Committee. The Managing Director, in addition to being an ex officio member of the Governance Committee, shall have voting rights on this committee.

10.2.3 Not later than February 15th each year, the Secretary shall ask members of the corporation to submit names of candidates for Community Trustees to the Secretary on or before March 1st for transmittal to the Governance Committee. Each name submitted must be accompanied by a statement from the person submitting the name as stating whether the person named has agreed to accept a nomination if offered.

10.2.4 In March of each year the Governance Committee shall submit to the Board of Trustees nominees for election as Community Trustees to fill positions of terms ending the following June 30th, and at any time when a Community Trustee vacancy exists.

10.2.5 Once each year in March the Governance Committee of the Board of Trustees may recommend to the full Board of Trustees one or more persons for Life Trustee, and the process set forth in section 6.6 above will then be followed.

10.2.6 In May or June of each year or whenever vacancies occur, the Governance Committee shall submit to the Board of Trustees nominees for officer positions set forth in section 8 above.

10.3 The Development Committee, in collaboration with the Managing Director and the Director of Development, oversees the development and institutional advancement activity of the corporation, participating in identifying sources of support, the cultivation of those sources, the appropriate approaches to those sources, and the maintenance and follow-up with those sources. The Committee shall also advise the Managing Director on relevant information to be provided to the Board of Trustees. The Development Committee co-chairs shall be appointed on an annual basis as set forth in section 9.2 above. The remaining members of the Development Committee shall be appointed on an annual basis by the President of the Board of Trustees in consultation with the President of the Orchestra, the Development Committee co-chairs, and the Managing Director.

10.4 The Human Resources Committee shall be co-chaired by the President of the Orchestra and the President of the Board of Trustees. The Human Resources Committee shall:

10.4.1 Review annually the Human Resources Handbook of the LPO and recommend changes to the Board of Trustees.

10.4.2 Review any adverse personnel action recommended by the Personnel Committee and, after consultation with the Legal Committee, make recommendations to the Managing Director, the Orchestra, or the Board of Trustees as appropriate.

10.4.3 Review any adverse personnel action recommended by any grievance committee convened in accordance with the Human Resources Handbook of the LPO, and, after consultation with the Legal Committee, make recommendations to the Managing Director or the Board of Trustees as appropriate.

10.4.4 Make recommendations to the Board of Trustees and the Managing Director on matters of management policy.

10.5 The Legal Committee shall provide legal advice and services to the Board of Trustees, the Managing Director, and the corporation. This advice and service shall be on a pro-bono basis. All members of the Legal Committee shall be licensed to practice law in the State of Louisiana.

10.6 The Finance Committee shall have as one of its co-chairpersons the Treasurer of the LPO. The other co-chairperson shall be either from the orchestra or the community, being from the opposite group from the Treasurer. The Finance Committee shall

10.6.1 advise the Treasurer, the Managing Director, and the Board of Trustees on the financial operations of the LPO, including the establishment of budgets, the management of funds including investments, cash flow and cash balances, the control of expenditures, and the forecasting of receipts;

10.6.2 review and comment on the procedures being used to safeguard the funds of the LPO and the arrangements being used for the audit and accounting of all financial matters; and

10.6.3 communicate to the Board of Trustees no later than March 15th of each year its recommendation as to the maximum number of full-time orchestra members for the following season.

10.7 The Planning Committee shall include equal numbers of musicians and community members plus the Managing Director, the chair of each LPO Advisory Board, the immediate past president of the Symphony Volunteers, the chairs of each of the Concert and Finance Committees or the member of the respective committee that its chair designates as the Planning Committee member for the season, and the Music Director. The Planning Committee shall, by April of each year, evaluate progress made during the past twelve months on the LPO's five-year plan and make recommendations to the Board of Trustees for updates, alterations, and extensions of that plan.

10.8 The Artistic Partnership Committee

10.8.1 The Artistic Partnership Committee shall have the following responsibilities:

10.8.1.1 Providing a forum for sharing information on a confidential basis between musicians and community regarding musical leadership;

10.8.1.2 Meeting as a committee on a regular periodic basis with each individual who occupies one of the positions of Music Director and Principal Conductor, Principal Guest Conductor, and Resident Conductor to:

10.8.1.2.1 assist each to evolve and grow in his or her respective role through the provision of advice, education, and feedback;

10.8.1.2.2 provide to each an annual formal evaluation;

10.8.1.2.3 improve recommendations made by the committee to the Board of Trustees (in the cases of the Music Director and Principal Conductor and of the Principal Guest Conductor) and to the Managing Director (in the case of the Resident Conductor) concerning renewals, extensions, modifications, or terminations of the contracts of each;

10.8.1.3 Conducting an annual formal evaluation of the Music Director;

10.8.1.4 Making recommendations to the Board of Trustees regarding renewals, extensions, modifications, or terminations of the Music Director's contract;

10.8.1.5 When required, serving as a Music Director search committee and making recommendations to the Board of Trustees for the employment of a Music Director.

10.8.2 Prior to making any recommendations to the Board of Trustees under section 10.8.1.4 above, the Artistic Partnership Committee shall solicit advice and opinion directly from the orchestra at an orchestra meeting and from the LPO Advisory Board at one of its regular meetings.

10.8.3 With respect to the making of recommendations to the Board of Trustees under section 10.8.1.5 above, the Artistic Partnership Committee shall place before the Board only the names of candidates who have received favorable vote of a simple majority of each of the following groups: all tenured musicians, and all members of the LPO Advisory Board. These votes should occur as early as practicable in the search process to avoid expending time on unacceptable candidates. The Committee will continue to seek input from musicians and the LPO Advisory Board as the evaluative process moves forward.

10.8.4 The Artistic Partnership Committee shall consist of ten members, six of whom shall be members of the corporation ("musician members") and four of whom shall be Community Trustees. Neither the President of the Orchestra nor the President of the Board of Trustees may be a member of this Committee. The President of the Board of Trustees in consultation with the President of the Orchestra shall appoint the four Community Trustee members of the Committee. The concertmaster of the orchestra shall be one of the musician members of the Committee. The remaining five musician members of the Committee shall be elected by the members of the corporation as follows:

- 10.8.4.1 one principal from among the wind/brass/percussion/ harp sections,
- 10.8.4.2 one section player from among the wind/brass/percussion/ harp sections,
- 10.8.4.3 one titled string player,
- 10.8.4.4 one section string player, and
- 10.8.4.5 one additional member without section or title restriction ("at large").

10.8.5 The musician members of the Artistic Partnership Committee other than the concertmaster shall have three-year terms commencing on October 1st and ending on September 30th in the third year following. One musician shall be elected in September of each year evenly divisible by three and two musicians shall be elected in the September of each other year to the slot(s) being vacated. The Community Trustee

members of the Artistic Partnership Committee shall have terms that coincide with their terms as Trustees.

10.8.6 The members of the Artistic Partnership Committee shall choose musician and community co-chairs of the Committee.

10.9 The Board of Trustees may establish such other committees deemed necessary or appropriate for the conduct of the affairs of the corporation. The Board of Trustees may appoint the members of each such committee established, and such members shall serve at the pleasure of the Board of Trustees.

11 Music Director

11.1 The Music Director reports to and is reviewed and evaluated by the Board of Trustees through its Artistic Partnership Committee.

11.2 The Board of Trustees is responsible for hiring, retention, and termination of the Music Director upon the recommendations of the Artistic Partnership Committee acting in accordance with sections 10.8.2 and 10.8.3 above.

11.3 The Music Director is responsible for

11.3.1 providing artistic leadership for the corporation in collaboration with the members of the corporation and members of the community as represented by the Artistic Partnership Committee of the Board of Trustees;

11.3.2 participating in artistic personnel matters as a member of the Personnel Committee as specified in section 5.2 above and in the Operating Rules and Procedures of the corporation; and

11.3.3 participating in the selection of performance pieces and guest artists as a member of the Concert Committee as specified in section 5.3 above.

11.4 The Music Director shall meet on a regular basis with the Artistic Partnership Committee of the Board of Trustees.

11.5 The Music Director is an ex-officio, non-voting member of the Board of Trustees, a voting member of its Product Development and Planning Committee, and a voting member of the Personnel and Concert Committees of the corporation.

12 Managing Director

- 12.1 The Board of Trustees is responsible for hiring the Managing Director.
- 12.2 The Managing Director reports to the Board of Trustees.
- 12.3 The Managing Director is reviewed and evaluated by the Board of Trustees through a process it establishes.
- 12.4 The Managing Director is responsible for
 - 12.4.1 providing leadership for the corporation in collaboration with the members of the corporation as represented by the Musicians' Committee and the community as represented by the Community Trustees;
 - 12.4.2 recommending policies to the Board of Trustees and implementing policies established by the Board of Trustees; and
 - 12.4.3 managing the ongoing affairs of the corporation through its administrative staff.
- 12.5 The Managing Director is an ex-officio, non-voting member of the Board of Trustees and all of its committees except that
 - 12.5.1 the Managing Director shall have a vote on the Governance Committee, and
 - 12.5.2 the Managing Director shall not be a member of the Human Resources Committee.
- 12.6 The Managing Director is an ex-officio, non-voting member of the Concert Committee.

13 Administrative staff roles

- 13.1 The positions of Personnel Manager/Personnel Administrator and Librarian may be occupied by members of the corporation. The Personnel Manager/Personnel Administrator reports to the Operations Manager/Artistic Administrator and that role is considered a member of the administrative staff. The Librarian reports to the Operations Manager/Artistic Administrator and that role is considered a member of the administrative staff.
- 13.2 The Managing Director, in consultation with the Board of Trustees, establishes the remainder of the administrative staff structure of the corporation.

13.3 At the discretion of the Managing Director, members of the corporation may also occupy administrative staff positions established in accordance with section 13.2 above. In such administrative staff roles, such members report to the Managing Director.

14 Indemnification

14.1 The corporation shall indemnify any person who was or is a party or is threatened to be made a party to any action, suit, or proceeding, whether civil, criminal, administrative, or investigative (including any action by or in the right of the corporation) by reason of the fact that such person is or was a trustee, officer, employee, or agent of the corporation subject to the limitations in sections 14.2, 14.3, and 14.4 below.

14.2 The indemnification identified in section 14.1 above shall be against actually and reasonably incurred expenses (including attorneys' fees), judgments, fines, and amounts paid in settlement

14.3 The indemnification identified in section 14.1 above shall be conditional on the indemnified person having acted in good faith and in a manner he/she reasonably believed to be in or not opposed to the best interests of the corporation, and, with respect to any criminal action or proceeding, had no reasonable cause to believe his/her conduct was unlawful.

14.4 In cases of actions by or in the right of the corporation, the indemnification identified in section 14.1 above shall be limited to expenses (including attorneys' fees, and amounts paid in settlement not exceeding, in the judgment of the Board of Trustees, the estimated expense of litigating the action to conclusion) actually and reasonably incurred in connection with the defense or settlement of such action; no indemnification shall be made in respect of any claim, issue, or matter as to which such person shall have been adjudged to be liable for negligence or misconduct in the performance of his/her duty to the corporation unless and only to the extent that the court shall determine upon application that, despite the adjudication of liability but in view of all the circumstances of the case, he/she is fairly and reasonably entitled to indemnity for such expenses which the court shall deem proper.

14.5 To the extent that a trustee, officer, employee, or agent of the corporation has been successful on the merits in defense of any such action, suit or proceeding, or in defense of any claim, issue or matter therein, he/she shall be indemnified against expenses (including attorneys' fees) actually and reasonably incurred by him/her in connection therewith.

14.6 Expenses incurred in defending such action, suit, or proceeding may be paid by the corporation in advance of the final disposition thereof if authorized by the Board

of Trustees, upon receipt of an undertaking by or on behalf of the trustee, officer, employee, or agent to repay such amount unless it shall ultimately be determined that he/she is entitled to be indemnified by the corporation.

15 Operating Rules and Procedures—The Operating Rules and Procedures of the corporation (which appear following these bylaws) are of two types. Sections 1 through 3 of the Operating Rules and Procedures address the processes and procedures associated with the initiation of membership in the corporation (auditions), the granting of tenure to members of the corporation, and the termination of membership in the corporation. All other sections of the Operating Rules and Procedures cover matters that might historically have been part of collective bargaining agreements (so-called “work rules”) and which are designed to facilitate the orderly functioning of each season, including rehearsals and performances, and more common personnel matters such as leaves.

15.1 The Operating Rules and Procedures may be amended only

15.1.1 by the members of the corporation

15.1.2 at meetings held pursuant to section 2 above.

15.2 The Musician's Committee may not waive or suspend any provisions of sections 1 through 3 of the Operating Rules and Procedures. In a particular instance the Musician's Committee may waive or suspend provisions of sections of the Operating Rules and Procedures other than 1 through 3.

16 Records/Reports

16.1 The corporation shall keep as permanent records

16.1.1 minutes of all Corporate Meetings, its Board of Trustees, and its Presidents' Committee;

16.1.2 evidence of all formal corporate actions taken without a meeting by the members of the corporation, the Board of Trustees, or the Presidents' Committee;

16.1.3 membership records giving the names and addresses of the members of the corporation in alphabetical order;

16.1.4 records of its assets, liabilities, receipts, disbursements, gains, losses, capital and surplus, and other appropriate accounting records.

Operating Rules and Procedures Sections

Terminology used in these Operating Rules and Procedures shall have the same meaning as when used in the Corporate Bylaws.

Specific provisions in Operating Rules 4 through 14 may be waived by majority vote of the Musicians' Committee for particular circumstances.

1 Audition Procedures—No audition for any vacant chair in the orchestra may be advertised without the prior written approval of a majority of a group comprising the Music Director, the Chair of the Personnel Committee, the Chair of the Concert Committee, and the Musician Co-Chair of the Finance Committee. Each of these Chairs/Co-Chairs shall consult with their respective committees before voting to advertise any audition.

1.1 Audition Committees shall consist of the members of the Personnel Committee of the LPO (see section 5.2 of the corporate bylaws) and the additional tenured members of the LPO specified in the subsections to 1.1 below.

1.1.1 When an audition is held for a non-titled string position, all tenured members of the specific section and all tenured principals of the orchestra may serve on the Committee and shall have the right to vote. All non-tenured members of the specific section and all tenured members of the string section in general may attend the audition; they shall have no right to vote, although the Committee may solicit their opinions.

1.1.2 When an audition is held for Concertmaster, Associate Concertmaster, or Assistant Concertmaster, all tenured string players and all tenured principals of the orchestra may serve on the Committee and shall have the right to vote. All other members of the orchestra may also attend the audition; they shall have no right to vote, although the Committee may solicit their opinions.

1.1.3 When an audition is held for any other principal string or titled string position, all tenured members of the specific section and all other tenured principals of the orchestra may serve on the Committee and shall have the right to vote. All non-tenured members of the specific string section and all tenured members of the string section in general may attend the audition; they shall have no right to vote, although the Committee may solicit their opinions.

1.1.4 When an audition is held for any woodwind position, all tenured members of the woodwind section and all other tenured principals of the orchestra may serve on the Committee and shall have the right to vote. All non-tenured members of

16.2 Every member of the corporation may examine, in person or by agent or attorney, at any reasonable time, the records of the corporation mentioned in section 16.1.1 above.

16.3 The corporation shall make available to each member of the corporation upon that member's request the corporation's audited annual financial statements.

17 Amendment of Bylaws

17.1 The members of the Board of Trustees of the corporation may amend these bylaws at a Board meeting as set forth in section 7.7 above by a vote as set forth in section 7.8 above, subject always to the power of the members of the corporation in accordance with section 17.2 below.

17.2 The members of the corporation may amend these bylaws only at a meeting (a) each musician holding a tenure, probationary, or temporary contract, and (b) each full-time staff member. which satisfies the requirements of section 2 above.

Operating Rules and Procedures Sections

Terminology used in these Operating Rules and Procedures shall have the same meaning as when used in the Corporate Bylaws.

Specific provisions in Operating Rules 4 through 14 may be waived by majority vote of the Musicians' Committee for particular circumstances.

1 Audition Procedures—No audition for any vacant chair in the orchestra may be advertised without the prior written approval of a majority of a group comprising the Music Director, the Chair of the Personnel Committee, the Chair of the Concert Committee, and the Musician Co-Chair of the Finance Committee. Each of these Chairs/Co-Chairs shall consult with their respective committees before voting to advertise any audition.

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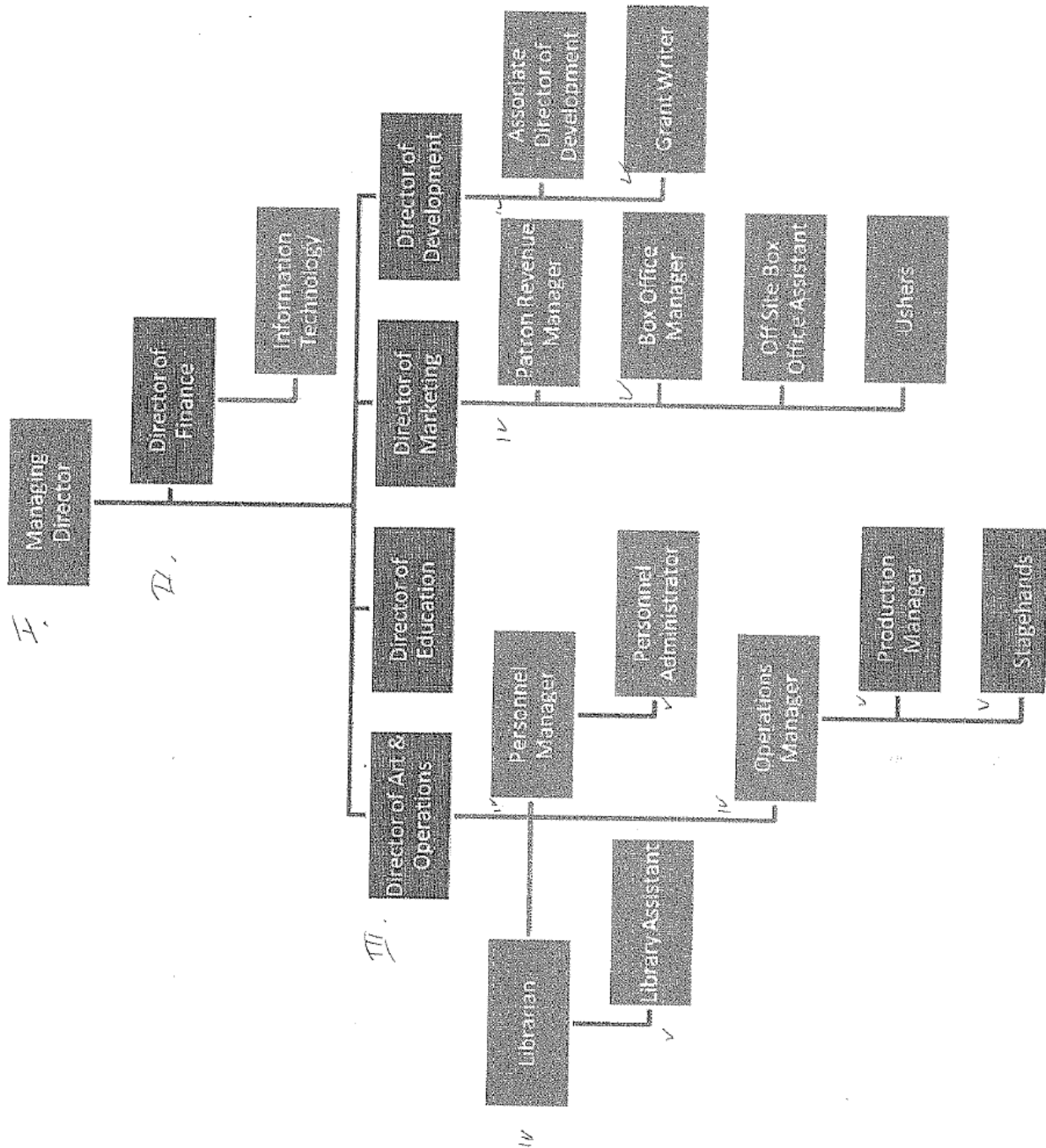
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1.1.3 When an audition is held for any other principal string or titled string position, all tenured members of the specific section and all other tenured principals of the orchestra may serve on the Committee and shall have the right to vote. All non-tenured members of the specific string section and all tenured members of the string section in general may attend the audition; they shall have no right to vote, although the Committee may solicit their opinions.

1.1.4 When an audition is held for any woodwind position, all tenured members of the woodwind section and all other tenured principals of the orchestra may serve on the Committee and shall have the right to vote. All non-tenured members of

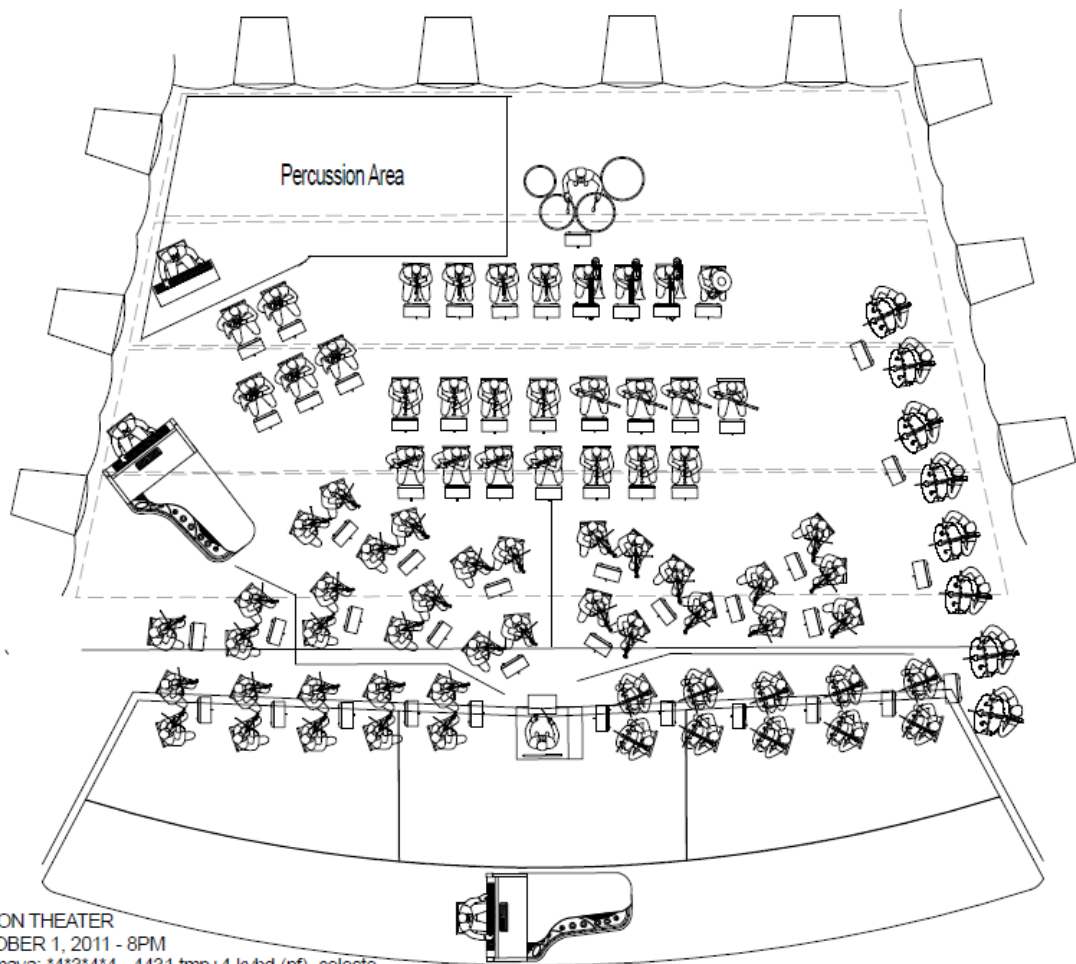
Appendix B.

Organizational Staff Structure

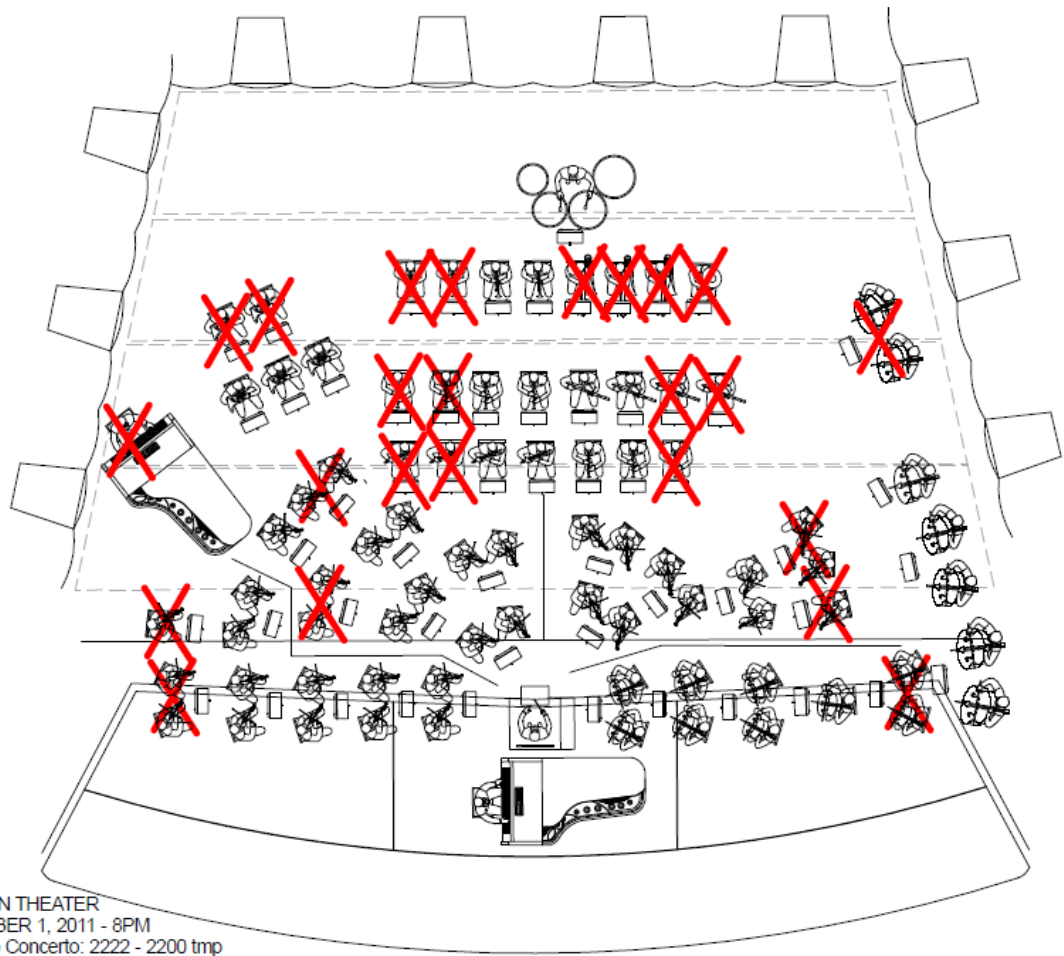


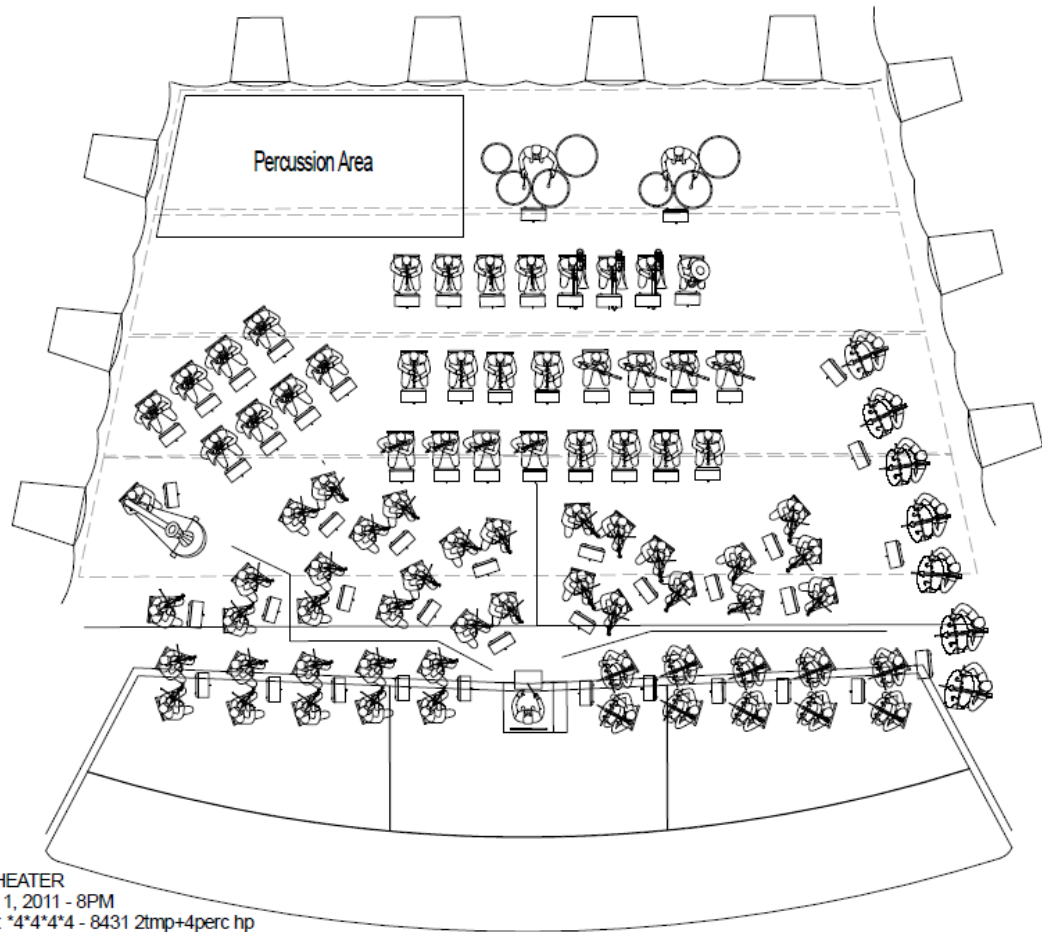
Appendix C.

LPO Classics 1 Orchestra Plots



CLASSICS 01
 MAHALIA JACKSON THEATER
 SATURDAY OCTOBER 1, 2011 - 8PM
 Revueltas Sensemaya: *4*3*4*4 - 4431 tmp+4 kybd (pf), celeste
 String count: 13/12/11/10/8





Appendix D.

Spectrum Payroll Sheet

Spectrum Employee Services

New Employee Form

Company: Louisiana Philharmonic Orchestra

Employee Name: _____

SSN: _____

Date of Hire: _____

Date of Birth: _____

FT or PT _____

Department: _____

Position: _____

Address: _____

Rate of Pay: _____

Email Address : _____

Deductions :

- W-4:
- L-4:
- _____
- _____

Other: _____

Transmittal date to Spectrum: _____

Spectrum Contact: _____

Appendix E.

LPO-LSU Mellon Grant

October 18, 2011

Ms. Susan Feder
Program Officer for the Performing Arts
The Andrew W. Mellon Foundation
140 East 62nd Street
New York, NY 10065

Dear Susan:

On behalf of the Louisiana Philharmonic Orchestra, I am respectfully submitting a proposal to The Andrew W. Mellon Foundation requesting \$750,000 over the thirty month period of January 1, 2012 to June 30, 2014 to support development of a strong, mutually beneficial partnership between the Louisiana Philharmonic Orchestra and Louisiana State University's College of Music and Dramatic Arts (CMDA). The partnership will utilize resources of the only full-time professional orchestra in the Gulf South and the flagship public university of Louisiana to expand the market of music performance and engagement and to create 21st century access via technology to music and educational content. The partnership will enable the LPO and LSU to create programs beyond the individual capacity of either institution.

It is understood the final proposal of an approved grant will serve as an agreement between the LPO and The Andrew W. Mellon Foundation, and the LPO will be responsible for adhering to each of the Foundation's expenditure and reporting guidelines.

The LPO and its musicians are appreciative of past support from The Andrew W. Mellon Foundation and look forward to the possibility of continued efforts to improve the quality of orchestral music and higher education in the 21st century. Thank you for your time and consideration, and please contact me should you need additional information.

Sincerely,

Barbara Mollere
Managing Director

B. Project Description

Introduction

The Louisiana Philharmonic Orchestra requests \$750,000 over a thirty month period from The Andrew W. Mellon Foundation to develop and build a mutually beneficial partnership with Louisiana State University's College of Music and Dramatic Arts (CMDA). The musical, technological, and educational programming created through the partnership will not only extend the reach of the LPO's and LSU's audiences and provide them with more extensive and valuable programs, it will also provide opportunities for musicians, students, and faculty to become involved in innovative work.

Project Background

This effort is built on recent connections between the two institutions. These early collaborations have included LPO musicians serving as adjunct faculty in the CMDA and LSU faculty and graduate students performing with the LPO. In 2010, Jorge Frederico Osorio, a guest artist for an LPO performance, was brought to Baton Rouge for a recital at LSU's Latin American Conference, which attracted people from throughout Latin America and the Gulf South to the university. More recently, with funding from a Mellon Foundation Officer's Grant, the LPO performed Mahler's Symphony No. 7 at LSU's Union Theater on May 5, 2011. This concert supported efforts to replace CMDA scholarship funds lost in recent university budget cuts. Subsequent grant-supported partnership planning revealed opportunities with LSU's CMDA for use of technology resources, specifically the Louisiana Optical Network Initiative (LONI), an inter-university research collaborative that uses a high-speed, fiber optic network to connect supercomputers at Louisiana's major research institutions including, LSU; Louisiana Tech University; LSU Health Sciences Center, New Orleans and Shreveport; Southern University and A&M College; Tulane University; University of Louisiana at Lafayette; University of New Orleans; and a number of other associate institutions in Louisiana and Mississippi. In addition, university assets include technological support and advice for public access via streaming and internet along with university personnel experienced in gathering and evaluating internet analytics. Experimentation to date by LSU has indicated that a portion of LSU's 200,000 active alumni base and 28,000 student population is interested in live and online access to music events and performances.

The LPO can immediately offer to the partnership an array of performances for a wider audience. The creation of technologically advanced music content for broader technological transmission is the work of the future partnership. The integration of this work into LSU's current curriculum and program upgrades for various undergraduate and graduate degrees will also be reviewed by Dean Laurence Kaptain of the CMDA and faculty from the College of Humanities and Social Sciences, specifically Adelaide M. Russo, Director of the LSU Program in Comparative Literature.

Details of Project

Year One

During the first year of the partnership, the LPO and LSU will:

- Schedule regular monthly phone conferences for evaluation and partnership execution in year one
- Offer two concerts identified with the partnership and performed by the LPO in New Orleans on January 25, 2012 and May 12, 2012 to a live audience and to internet audiences throughout Louisiana
- Explore options for four or more additional LSU performances by LSU constituents from Baton Rouge identified with the partnership for live and internet audiences composed of university students, faculty, and alumni and LPO's current audience in 2012. LSU performances in all three years will be performed independent of the LPO and will be an LSU contribution to the partnership, highlighting guest artists and LSU faculty as well as elite LSU student performing artists. Performance dates for years one, two, and three will be determined in spring 2012
- Identify twelve LSU students to serve as technology assistants for performance activities
- Participate in enrichment planning for LSU curriculum upgrades, such as master classes and digital course content, at the CMDA and determine involvement of the College of Humanities and Social Sciences during spring 2012 for implementation in years two and three
- Bring LPO Music Director Carlos Miguel Prieto to the campus of LSU for an LSU master class/orchestra rehearsal and planning session during spring 2012
- Identify seven LPO musicians to offer master classes to LSU undergraduate and graduate students in CMDA studio classes a total of one to two times per semester, impacting approximately 200 students annually
- Expand the responsibilities of the current LPO Manager of Operations to include technological work related to the partnership and hire two Operations Interns
- Complete a planning workshop in February 2012 for years two and three including joint agreement on marketing and dissemination of content and development of business plan
- Execute an LPO IP Agreement with the Mellon Foundation

The LPO seeks to extend the reach of a concert by the full orchestra celebrating the Bicentennial of Louisiana Statehood to an internet audience. This concert builds on *Musical Louisiana: America's Cultural Heritage*, an annual partnership project of the last five years with The Historic New Orleans Collection (THNOC), the premiere historical research center in Louisiana, featuring multiple concerts and statewide educational components. This concert, also supported by THNOC, will occur on January 25, 2012 at St. Louis Cathedral in New Orleans. Venue fees will be covered by THNOC in year one. LPO Music Director, Carlos Miguel Prieto, will conduct *Becoming American: The Musical Journey* featuring music known to New Orleanians between 1812 and 2012. The concert will emphasize the European cultural background extant in 1812 and the way in which both American music forms and a sense of American culture in Louisiana grew from European and Afro-Caribbean roots. It will feature guest artists with ties to Louisiana and will include the New Orleans premiere of Jelly Roll Morton's *Gan Jam*, written by this acclaimed New Orleans native and recently published by C. F. Peters as well as Dudley Buck's *Variations on Star Spangled Banner* for Organ; Vincente Martín y Soler's Overture to "Una Cosa Rara;" Beethoven's Prometheus, Op. 43 Overture and Piano Concerto No. 1, 1st movement; Gentry's L'amant jaloux Soprano aria, "Je romps le chaine;" Von Suppe's Light Cavalry overture; Mendelssohn's Midsummer Night's Dream, Scherzo; and Rosas' Over the waves. This one-of-a-kind concert will be offered free to the public and performed in one of the oldest

historic locations in Louisiana. Seating at St. Louis Cathedral is limited to 500. Past LPO concerts at this location have reached standing room only capacity, indicating a need for expanded audience viewing options, which will be accomplished via streaming distribution. The opportunity to stream the concert throughout Louisiana will be a new effort and will allow significant participation from an internet audience, previously identified by LSU, beyond New Orleans.

The second concert in year one will be a new effort in a new New Orleans location with a new concert and will be offered on May 12, 2012. Champions Square is a new outdoor location adjacent to the Louisiana Superdome and New Orleans Arena in one of the most technologically state-of-the-art outdoor urban performance spaces in downtown New Orleans, offering the use of video screens and extensive lighting enhancements. Champions Square brings 21st century production attributes to an outdoor LPO concert and can accommodate up to 7,000 people. Conducted by Carlos Miguel Prieto, this concert will feature newly orchestrated music of a rising New Orleans artist performing with the LPO. Current negotiations are underway with Troy “Trombone Shorty” Andrews, who has previously worked with the LPO and is active on the local, national, and international music scene. Beginning in January 2012, Prieto and Andrews will determine the selection of music for concert programming and will work with Jeff Tyzik to orchestrate charts. Both the orchestra and the guest artist will emphasize differing aspects of music currently coming from New Orleans to a live local audience and to a larger audience throughout the state via internet streaming. In addition to LSU’s CMDA, the LPO has partnered with SMG and Alan Freeman, the manager of Champions Square, the Superdome, and the New Orleans Arena in order to make the concert free and open to the public, locally. The LPO and SMG have negotiated the use of Champions Square free of charge in year one and at a significantly discounted rate in years two and three. LSU will offer technological and marketing support, use of LONI, and involvement of students in the production and transmission of the concert.

The target audience market for the live and streamed concerts in the first year is 28,000 LSU students, 1,300 faculty, and 200,000 active alumni as well as the LPO’s audience base of 30,000. Through a combination of traditional and popular culture print, radio, direct mail, and online media, the LPO will promote the ability to view concerts through live streaming, generating an interest in the online experience to be associated with the “Live from Louisiana” brand in years two and three.

During concert performances, recording technicians from Wild Hare Productions (for the St. Louis Cathedral concert) or the Solomon Group (for the Champions Square concert) will use high-definition cameras to capture, encode, and broadcast the LPO’s live, digitized audio and video streams. The LPO’s website will host publically accessible live streams sent via third party streaming providers, such as Livestream or Ustream. On the advice of Dr. Stephen Beck, LSU’s Cultural Computing Focus Area Lead at the Center for Computation and Technology, the same streams will also be sent to LONI hubs in New Orleans where they will be forwarded through the LONI pipeline to LSU’s Center for Computation & Technology. At the Center, the streams will be formatted for distribution to end users on the LONI network as well as stored for future on demand use by LSU and other Louisiana universities. The use of LONI provides the bandwidth necessary to optimize audio/visual signals, ensuring high quality sound and image. Beyond

storing digital files of concert recordings, LONI enables the LPO to act as an education resource for university students via digital content, provides the LPO access to a younger audience demographic, and allows for recognition of the LPO by a larger audience.

As indicated by LSU, twelve LSU students proficient in creative arts enterprise and entrepreneurship from the Experimental Music/Digital Media (EM/DM) Degree Program, which is closely aligned with LSU's Arts, Visualization, Advanced Technologies and Research (AVATAR) Project, a multidisciplinary initiative at LSU focusing on the intersections among art, technology, and computation, will work with professional recording technicians at LPO performances to learn sound mixing and camera setting and control skills necessary to create quality audio and visual recordings. Students will work with EM/DM and AVATAR professors Dr. Stephen Beck and Jessie Allison to research and execute new digital strategies for sound design and interactive applications of digital manipulation of sound, fulfilling requirements for the EM/DM Program. Potential student contributions also include the creation of instructional videos and recordings of LSU partnership performances, which would be uploaded to the LONI network for future use in blended learning classes.

The LPO and LSU partnership will create new opportunities for blended learning, which combines traditional in-class instruction with access to online content and instruction, through the development of progressive academic resources that will be made available to university and Independent and Distance Learning students via the LONI network. Members of the public and LPO patrons will also have access to digital content via the LPO's website or password-granted access to LONI. LONI serves as the backbone of internet connectivity for LSU and will be utilized by the partnership to access on demand recordings of LPO performances and other educational content for academic use. Technological content will be developed throughout the partnership with the help of CMDA staff members including: David Pogue, CMDA Technology Resident and American technology writer, who will create distance learning episodes; Scott Eric Olivier, CMDA Technology Advisor, who will play a key role in the storage of archival data and transmission of content; Marcus Lyle Brown, Consultant to the CMDA Dean, who will add expertise on the Louisiana Entertainment Tax Incentive Programs to the project; Chris Boneau, CMDA Theater Resident, who will aid in communication and media aspects of the partnership; and Joey Watson, CMDA Coordinator for Communications Across the Curriculum and Digital Media, who will facilitate the program.

Educational content will be developed over the course of the partnership and will begin with the filming, broadcasting, and storing of master classes via LONI. Master classes led by Carlos Miguel Prieto as well as a combination of individual LPO musicians or ensembles will be offered to undergraduate and graduate students in the CMDA's studio classes of the instrumental studies program one to two times per semester. Master classes offering private instruction and question-and-answer sessions will be led both at LSU and remotely via LONI from New Orleans. LPO educational enhancement through master classes as well as orchestra rehearsals led by Prieto will serve as immediate instruction for current LSU students and will be stored on LONI for later use as content for blended learning in LSU's Independent and Distance Learning and music courses, impacting over 2,000 LSU students in the initial stages, with numbers increasing each year of the partnership. Master classes and orchestra rehearsals will also be available via streaming to the LPO audience and the public, allowing patrons a rarified "insiders"

view of performance practice. An additional outlet could be dissemination through mobile devices.

CMDA Dean Laurence Kaptain has initiated discussions with the College of Humanities and Social Sciences to explore opportunities to utilize student participation in technological and artistic production of the partnership to provide students with artistic, technical, and administrative skills through the prism of film and video, specifically for students in the Film and Television concentration. In addition, a key faculty member for this collaboration is Adelaide M. Russo, Director of the LSU Program in Comparative Literature, who is interested in developing music content and inter-media studies coursework to examine the relationships between literature and other art forms and discourses for blended learning use with the CMDA. Potential involvement with the College of Humanities and Social Sciences will be explored in year one of the partnership and will be implemented in years two and three.

In order to facilitate the production of concerts and content intended for streaming and digital files, the LPO plans to reconfigure an existing position and add two new paid internships. The LPO's current Manager of Operations will work under a new title, Manager of Artistic Operations and Performance Technology. Ron Bermingham joined LPO in 2009, having been Director of Artistic Operations, Education, and Community Engagement with Baton Rouge Symphony (2005-2009), the head of New Orleans Center of Creative Arts Musical Theater Division (2002-2005) and General Director of Ganaraska Festival Theater (1993-2003). Bermingham holds two master's degrees and a Ph.D. from McGill University and performed with operas across Canada and in Belgium, France, Holland, and Germany. He has a lifelong interest in technology, beginning with his work as a radio host and commentator, which he continued at Trinity College School, setting up the Humanities Computing Centre. He is expertly equipped to step up to this new role with LPO, and his salary would be increased to reflect his new responsibilities.

The LPO has a long history of working with interns from the University of New Orleans Master's in Arts Administration program. Recently, the LPO pursued setting up a new position for a paid internship working with Dr. Harmon Greenblatt, Director of the Graduate Program in Arts Administration at UNO. The LPO would like to add two paid internships in the area of Operations to assist with production responsibilities and to offer direct experience with productions slated for streaming. All new positions would interface with the LSU-LPO partnership. The LPO has a number of past interns and current students from whom to choose for the internship positions. The internships and reconfiguration of the current Manager of Operations position will remain past the grant period and will be supported through income from additional revenue from concerts and festival activities and fees from downloading.

The LPO and LSU are in agreement that ownership of digital files will remain with the performing institution. If LSU musician "extras" are involved in an LPO performance, all rights and ownership remain with LPO. If musicians from the LPO are engaged for a performance by LSU, all rights and ownership remain with LSU.

IP Agreement with The Andrew W. Mellon Foundation

The LPO will execute an IP Agreement with The Andrew W. Mellon Foundation, particularly to address the archiving and sales of concert recordings. The LPO Librarian, Crozet Duplantier, will secure licenses to any content not already owned by the LPO that would be used in these activities and supported by Mellon. The development of software is not currently anticipated during the initial three years of this partnership. LPO staff members or interns whose salaries would be supported by Mellon will be involved in the planning and oversight of the creation of digital files but will not execute recording or creation of digital files nor design software related to the recording or online distribution of the files or any curricular components.

The recording of LPO concerts in New Orleans by recording technicians from Wild Hare Productions or the Solomon Group is the only Mellon supported work that would result in the creation of digital files. Mellon funds will be used to support musician fees for LSU master classes, but digital content or coursework created from recordings of LSU master classes will not be funded by Mellon and will be in accordance with the IP Agreement.

LSU will create digital files in conjunction with LSU performances by LSU constituents, the work of LSU technology assistants, digital course content created by LSU faculty, and the recording of LPO master classes and orchestra rehearsals. These efforts will not be funded by Mellon.

Year Two

During the second year of the partnership, the LPO and LSU will:

- Schedule regular monthly phone conferences for evaluation and partnership execution in year two
- Offer two concerts identified with the partnership and performed by the LPO in New Orleans in January 2013 and spring 2013 to a live audience and internet audiences throughout Louisiana
- Present four or more additional LSU performances by LSU constituents identified with the “Live from Louisiana” partnership brand from Baton Rouge for live and internet audiences composed of university students, faculty, and alumni and LPO’s current audience in 2013
- Identify twelve LSU students to serve as technology assistants for concert activities
- Deliver LPO enrichment resources including live and streaming master classes and LPO video content for LSU curriculum at the CMDA and the College of Humanities and Social Sciences during 2013
- Bring appropriate LPO personnel to the campus of LSU to support and expand curriculum upgrades identified by LSU in 2012
- Maintain and evaluate work of the Manager of Artistic Operations and Performance Technology and Operations Interns
- Complete a planning workshop in February 2013 for a live and online festival in year three
- Secure additional funding for partnership activities

Paralleling year one of the partnership, the LPO will utilize THNOC concert in January 2013 and will create a second program currently planned for Champions Square. Both programs will be

presented to a live audience and will be made available via streaming. The two concerts, along with programs from LSU, will be branded in 2013 with the potential title, “Live from Louisiana.” The LPO Director of Marketing will work with Holly Houk Cullen, LSU Assistant Vice Chancellor for University Relations, to determine the most beneficial strategies to market the “Live from Louisiana” brand to reach the LSU audience, student and faculty audiences at other Louisiana institutions, the LPO’s existing audience, and a broader audience in Louisiana interested in culture. The LPO and LSU will build on marketing and business plans from year one and to anticipate obstacles arising from monetizing the product and partnership, will gain expertise about projected revenue from downloads and festival sponsorship, which will take place in year three.

SMG has agreed to allow the LPO to secure sponsors for events at Champions Square. LSU has already indicated interest from a number of individual donors who could fund initiatives that integrate technology and research with music and higher education. The LPO will execute an agreement with LSU for shared net revenue exclusive of sponsorship. In the second year of the project, analytics of the internet audience from years one and two will be evaluated. The partnership will also determine the potential for an expanded national market base for the third year of the project.

Year Three

During the third year of the partnership, the LPO and LSU will:

- Offer three concerts identified with the partnership and performed by the LPO in New Orleans to live and internet audiences: one in January 2014 and two festival concerts in spring 2014
- Present four or more additional LSU performances by LSU constituents identified with the “Live from Louisiana” partnership brand from Baton Rouge for live and internet audiences composed of university students, faculty, and alumni and LPO’s current audience in 2014
- Identify twelve LSU students to serve as technology assistants for concert and festival activities
- Deliver enrichment resources for LSU curriculum at the CMDA and the College of Humanities and Social Sciences during 2014
- Bring appropriate LPO personnel to the campus of LSU to support curriculum upgrades identified by LSU in 2012
- Maintain and evaluate work of the Manager of Artistic Operations and Performance Technology and Operations Interns
- Complete planning and execution of a live and online festival in spring 2014
- Jointly secure additional funding for partnership activities

With the branding of “Live from Louisiana” in year two, year three will feature the live and online presentation of concerts and an additional two-day festival. Artistic planning for the festival will be led by Carlos Miguel Prieto and the concert committee of the LPO. The festival will continue the artistic vision of the project, which is to provide a sense of place about New Orleans by recognizing its influence on and position in the rich classical and contemporary musical heritage of Louisiana. It will build on the combination of the orchestra and guest artists. Presented in the third year, the festival will involve two large live concert performances in New

Orleans on consecutive days, further utilizing resources with SMG for concert venue amenities. The Champions Square venue allows for a paid portion of the audience with access to exclusive seating and additional amenities; revenue from the sale of these tickets will support the work of the technological positions after the grant period. All concerts and festival activities will be recorded for online streaming and potentially for downloading and will allow for audience interaction.

An aspirational aspect of the festival includes creating a synchronous event between the LPO concerts at Champions Square and multiple university locations throughout Louisiana. The bandwidth and connectivity of the LONI network would enable Carlos Miguel Prieto to lead multiple musician ensembles at multiple locations in real time as he conducts the LPO at the Champions Square concert. Ensembles from LSU and potentially other Louisiana universities would be recorded and projected onto screens at the Champions Square concert creating a real-time, remotely-led synchronous experience. Projections could also be reversed to project the LPO concert at LSU and other Louisiana universities, creating a statewide festival event available for synchronized viewing in multiple locations as well as online. The festival will be promoted through an online media marketing campaign that will also involve student interaction on campus.

Other aspirational interests of both institutions that are likely to develop through concert- and educational-related partnership activities include:

- Use of live, interactive digital media and the evolving tools of connectivity, creativity, and education
- Joint utilization of the intellectual assets and creative capital of LSU
- Research on cognition, perception, intention, and action to inform teaching and learning in arts
- Preparation for students as future contributors to the new creative economy

Mellon funds will not directly support these activities, but support of the LPO's partnership with LSU is the first step in their consideration.

Summary

The LPO adopted a new strategic plan in 2011. Two key areas identified in the new mission statement are supported by the LSU partnership: *reaching out to diverse regions, neighborhoods, and audiences* and *connecting through various mediums and venues*. Through new technologies and an on-campus presence, this partnership will extend the reach of the LPO to the broader LSU campus audience and to the LSU alumni base throughout Louisiana and potentially the nation.

This work will also support three of LPO's recently defined core strategies: 1) *using emerging technologies to reach new audiences and develop new products*, 2) *continuing staged regionalization*, and 3) *expanding and strengthening involvement in all areas of education* as well as aspects of the LPO's mission: *creativity and innovation toward a fine artistic product; extraordinary audience experiences; contributing to the cultural richness of our home; and bringing ambitious, inspiring concerts to a broader audience through various technological media*. LPO's current reach of presenting live concerts in the Greater New Orleans Area will be expanded to be connected to live concerts on the Baton Rouge campus of LSU; performances from New Orleans and from LSU will also be available through live-streaming and interactive

web-based technologies to an internet audience. This larger internet-based audience will allow for building relationships to technology users and creating appropriate fund development efforts, strengthening both LPO's business and artistic base. Through this partnership, LPO and LSU audiences will be able to choose a broader array of music experiences and through interactive technology, will have the possibility of forming a deeper connection with musical content. The LPO represents a valuable resource for educational enhancement for the higher education community through master classes, seminars, other professional enrichment, and content for teaching of digital techniques.

The LPO-LSU partnership combines the music products of the only musician-owned and operated orchestra in the Gulf South with LSU's intellectual resources, creative assets, and technological equipment. Because of the geographical proximity and the power of the LONI network, this collaboration provides the LPO with access to the broad LSU student, faculty, and alumni populations and directly benefits students, faculty, and community partners.

Through this partnership, both entities will further engage the larger community with cultural experiences and serve the population of Louisiana. The partnership will bring awareness of the music value of Louisiana's flagship university and full-time professional orchestra working together to offer a "cultural extension service" to Louisiana and beyond. This service, once realized, can be the means of additional monetary support for both institutions, directly and through leveraging of the partnership.

C. Organizational Narrative

Financial Assessment

The LPO's past five seasons are the five complete seasons post-Katrina, and many of the trends reflect the extraordinary circumstances of the New Orleans region rebuilding following the storm and failure of the levee system. Earned income increased, on average, 9.2% per year compounded, rising every year, even during the economic downturn, driven largely by subscription sales that increased, on average, over 15% per year compounded both before and during the economic downturn. The primary effect of the economic downturn has been halted growth in contracted services; however, the LPO has exceeded pre-Katrina earned income levels. The LPO has produced a positive bottom line in the past five seasons, excluding 2009-2010, when the Board budgeted a deficit to avoid reductions in musician share and staff salaries greater than the 14% cut that was made. The planned deficit and cuts anticipated the economic downturn's significant effects on development, particularly annual giving, but the effects were greater than anticipated. The cuts would have been inadequate to cover the reduced annual giving, but the fiscal position of the LPO was sustained by a large unexpected bequest, preventing the budgeted deficit from being exceeded. The LPO returned a positive bottom line in the 2010-2011 season.

Maintaining working capital balances has always been a challenge for the LPO, though the oldest payables are consistently less than forty-five days. The major fiscal challenge for the LPO has been its inability to retire more than about one eighth of the three quarter million dollar deficit created three CEOs ago in the late 1990s. That negative net asset position has been covered with a variety of financing arrangements, including an unsecured \$800,000 line of credit. The LPO was always "out of the bank" at least once annually and consistently met the

terms of the line. The two effects of the economic downturn are: in 2011, the LPO will not be able to pay the line down to zero, and new banking regulations and examination standards are requiring banks to severely constrain lines of credit to nonprofit organizations. The LPO's bank has provided a 36-month term loan for \$600,000, replacing the line of credit.

Endowment funds on the balance sheet of the LPO are in the vicinity of \$1.6 million, about half of which is in the form of cash or receivables. The LPO also benefits from another \$1.5 million or so of funds held at a community foundation of which the LPO is the income beneficiary. Combining all of these, the market value moved from its peak of about \$3.3 million at the end of 2007 to a low (still at the point "above water") of about \$2.4 million in early 2009, and its value mid-2011 stood at about \$2.8 million, after having disbursed a relatively constant \$90,000 per year throughout this period. As noted earlier, the 2010-2011 season shows a small (<\$10,000) positive operating bottom line, and the budget for the 2011-2012 season is balanced.

Tickets

The average single ticket price over the last three years was \$33 with a high of \$95 and a low of \$10. The average subscription price was \$236 with a low of \$60 and a high of \$1,020. The various subscription series range from a series of five concerts to a full package of thirteen concerts. Between the 2008-2009 and 2010-2011 seasons, the LPO's subscription units have increased by 96%. Revenue during this time period increased by 65% and the number of subscriber households increased by 73%; single ticket revenue has increased by 7%.

Board Participation Policy

The LPO does not have a "give or get" policy, but a median donation amount is well understood by the board, which has grown to embrace its role as the *lead giving body* of the LPO. A few members of the board who do not give at the "average donation level" are connectors to large donations from supporting foundations and institutions. The LPO received contributions from a total of 570 individuals in FY09, 33 of whom were board members who provided 37% of total annual gifts from individuals. In FY10, board members counted for 26 of the 736 individual gifts and 32% of the total dollar gifts from individuals. In FY11, 23 of the 961 donors totaled 33% of total annual dollar gifts from individuals. Community board participation was 100% in FY09 and FY10 and 91% in FY11; since the LPO board includes a number of musicians whose salaries have been decreased in the past two years, these figures do not include musician trustees. Board members are subscribers at the rate of 81%. All board members purchase tickets in either single or subscription form.

Staffing Structure

The Administrative Staff of the LPO consists of fifteen full-time employees. In addition, LPO has a part-time box office assistant and a part-time personnel administrator. Duties are divided among five divisions: Artistic/Operations, Marketing, Development, Education, and Finance/IT. Each division director reports to the Managing Director. The LPO also seeks to increase the duties of a staff member who will work on production, technological, and scheduling aspects of partnership projects. Salaries and benefits have remained flat for two seasons, including the present fiscal year. Three years ago, salaries were reduced 14% due to budget requirements. Contracted Staff functions include: telemarketing and patron data management (marketing and development).

The Orchestra numbers sixty-seven full-time musicians; extra musicians number four to ten per concert. The season runs for thirty-six consecutive weeks, from September through May. Salaries and benefits have remained flat for two seasons, including the present fiscal year. Three years ago, salaries were reduced 14% due to budget requirements; senior staff compensation is based on multiples of musician “share” (annual salary). Orchestra size has been the same for many years and is expected to remain as-is for the foreseeable future. The musicians work under a Collective Bargaining Agreement (CBA) with the American Federation of Musicians; this agreement is produced by the musicians. The current CBA was established on June 1, 2010 and remains in force. The CBA is expected to be updated during the 2011-2012 season.

The structure of the LPO allows for the musicians, staff, and board leadership to work collaboratively to accomplish the mission of the organization. Musicians sit on the Board of Trustees, the Finance Committee, the Concert Committee, Governance Committee, Personnel Committee, and numerous other committees that support the work of the LPO. This arrangement has worked well for twenty years. Staff has regular interaction with the musicians vis-à-vis the committee structure and utilize various types of communication including a Musician’s website, regular newsletters, and orchestra meetings.

Technology

There have been recent investments in technology infrastructure. In FY10, the LPO installed a new ticketing and database system. It was essential to upgrade to a system which integrated ticketing and data management in order to communicate effectively with patrons and efficiently meet their needs with a small staff. The new system has provided an online ticketing system, allowing patrons to purchase tickets at any time and choose their own seats. The system now integrates ticket sales and donor information allowing staff to more effectively communicate with patrons and integrate data in planning and making projections for sales and donations. Based on the integrated information, the LPO is using a Patron Loyalty Index to more effectively target ticket buyers and donors with marketing and development materials. The online technology led to 43% of the FY11 tickets being purchased online. Patrons may now print their tickets at home. The LPO is also using ticket scanners at performances to accurately track attendance and patron behavior to assist with patron retention efforts. The LPO is currently undergoing a technology equipment upgrade, installing a new server, software, monitors, and hard drives to allow for more sophisticated software utilizing greater bandwidth and offering opportunities to work from multiple locations.

The LPO has increased the use of online media as a marketing tool. Online advertising was 6% of the marketing budget in FY11, an increase from 1% in FY10. Facebook and Twitter have been used to promote concerts and to connect with a broader audience. In FY11, the LPO started a Young Professional group managed completely by e-mail; events are promoted through Facebook, the LPO website, and e-blasts. The LPO also implemented a new form of interactive Program Notes, which are distributed through e-blasts.

The LPO refurbished its website in 2007 to include updated educational and outreach materials as well as the LPO podcast series, which introduces LPO’s range of music to a broader audience. A further upgrade of the website is planned for FY12. Through a partnership with The Historic New Orleans Collection (THNOC), the LPO produces and distributes educational CD/DVDs

throughout Louisiana with recordings of LPO performances centered on the music of New Orleans and Louisiana. This work has allowed the LPO greater reach and familiarity with recorded materials.

Archives

The LPO has maintained digital and hard copy archival files over the past twenty years. Some of the records of the New Orleans Symphony, the predecessor organization to the LPO, also are in LPO possession. On July 29, 2011, the LPO signed a formal agreement with THNOC to receive, organize, and house LPO printed archival materials; this archival process will begin in September and is a much-improved process, with permanent archival housing of the LPO's records. THNOC is used by researchers throughout the region and has become the best source for historical preservation of documents concerning New Orleans and Louisiana. Currently, THNOC is funding the archival work of LPO's printed materials as part of its partnership with the LPO; the LPO continues to archive its own concert recordings.

Organization

In July 2011 the Senior Vice President for External Affairs retired but continues to work on a project basis. In August 2011, the LPO's Director of Art and Operations moved to the Shreveport Symphony as Executive Director. The LPO has begun the search for a replacement and will continue to leverage its associations with these former employees to connect to a broader orchestral community. The LPO's Music Director, Carlos Miguel Prieto, is under contract until June 30, 2014. Hugh W. Long remains the Board President; Babs Mollere remains Managing Director. The current Orchestra President is Bill Schettler, who will serve for two years.

D. Organizational Overview

Formed in 1991, the LPO is dedicated to maintaining live symphonic music and a full-scale symphonic orchestra as an integral part of the culture and educational life of the New Orleans area, the entire state of Louisiana, and the Gulf South region. The LPO offers a full 36-week season with more than 100 performances, including classics, casual classics, pops, education, family, park, and outreach concerts, in New Orleans and across a multi-parish area. In addition, the LPO collaborates with and provides orchestral support for other cultural and performing arts organizations, including New Orleans Opera Association, Symphony Chorus of New Orleans, and Delta Festival Ballet. LPO musicians provide core and adjunct music faculty for area universities, offer private instruction, and mentor students in the Greater New Orleans Youth Orchestra. The LPO has taken a leadership role in rebuilding and strengthening the cultural life of New Orleans and the region since Hurricane Katrina and the BP Oil Spill.

Some recent accomplishments include the following:

- The LPO has seen near record-setting subscription sales and strong single tickets sales throughout the region for the previous and current seasons as a result of extensive work and integration of data collection for marketing and patron services. This occurred in an economically challenging public environment
- *Musical Louisiana; America's Cultural Heritage* received significant support (\$100,000) from the National Endowment for the Arts in FY11

- The LPO was selected by the League of American Orchestras to host the Bruno Walter National Conductor Preview in February 2011
- In February 2011 the LPO debuted a commissioned piece by Grammy-winning composer and trumpeter Terence Blanchard, celebrating the LPO's 20th anniversary.
- In October, 2011 the LPO will offer the world premiere of a consortium commissioned piece by Ellen Zwilich
- The orchestra performed Video Games Live in 2010, which was recorded and broadcast nationally on PBS
- In May 2010, the LPO participated in recording training sessions led by Terence Blanchard and other members of the music and film industry from Los Angeles. The intent was to offer musicians professional development toward securing live movie recording sessions. The LPO has not progressed further with the film initiative due to the lack of composing sound stages in New Orleans. Film recording continues to be of interest to the LPO and its musicians. The recording training provided a valuable experience in understanding the resources the LPO could offer, as well as the administrative personnel and infrastructure necessary to bring film work to fruition

Babs Mollere is Managing Director of the Louisiana Philharmonic Orchestra, a position she has held since 2004. Prior to this position, she served as the LPO's General Manager for two years. Preceding work with the orchestra included a two-year term on the LPO's Board of Trustees and two terms as President of Symphony Volunteers, Inc., the 600-member auxiliary volunteer organization. She has served on a variety of boards of music, education, and church institutions, including MASNO, NOCCA, Methodist Home for Children, and Ben Franklin Alumni Association. She has a BA from Vanderbilt University and has been a teacher in Baton Rouge and Giessen, Germany.

Carlos Miguel Prieto, Music Director and Principal Conductor, is considered one of the most dynamic young conductors in the music world and holds three music directorships. In Mexico, his native country, he leads the Orquesta Sinfonica de Minería and the country's most important orchestra, the Orquesta Sinfonica Nacional de Mexico. He is in his sixth season with the LPO and has made guest appearances with every major orchestra in Mexico and numerous orchestras in North America, Europe, Russia, Israel, and Latin America.

E. Project Budget Narrative

Total expenses include costs for two live partnership performances by the LPO in New Orleans, which will also be offered via internet access in years one, two, and three. Numbers in the first year budget represent the costs for the second performance, along with recording and internet costs for the first concert (other expenses for the January 2012 concert are previously budgeted and underwritten). In year three, total expenses are increased to accommodate an additional LPO festival performance as well as expanded costs of the festival. Costs for the LSU performances by LSU constituents in Baton Rouge will be covered by LSU.

Year One

Income

The total project budget will include support from THNOC in the amount of \$49,800 along with \$2,500, which is anticipated from the Louisiana Endowment from the Humanities. \$214,834 is

anticipated from Mellon Funds. An additional \$182,000 in-kind is estimated from LSU and includes \$120,000 for projected portions of salaries and fringe benefits of CMDA staff and faculty for technical, professional, and advisory commitments to project activities; \$32,000 in Equipment; \$20,000 in Space and Facility use for recording and editing; and \$10,000 for Internet Bandwidth and Connectivity as well as performances by LSU constituents.

Expenses

Total expenses include a portion of personnel salaries, not including benefits, funded by Mellon:

\$20,877 represents 25% of the LPO Managing Director's salary for planning and execution of partnership-related activities and concert series.

\$5,100 represents 10% of the LPO Director of Artistic Planning's salary for time related to planning LPO and LSU concerts and streaming events.

\$22,047 represents 45% of the LPO Manager of Artistic Operations and Performance Technology's salary for time and additional responsibilities related to planning LPO and LSU concerts and streaming events.

\$20,000 represents costs for two LPO Operations Interns for two semesters annually hired by LPO and working with LSU and the partnership.

\$4,500 represents the total cost of the Personnel Manager for two concerts.

Collaborative Performances provided by LPO:

Total costs for Collaborative Performances include the cost of two LPO concerts planned for year one: the January 25, 2012 concert at St. Louis Cathedral and the May 12, 2012 concert at Champions Square.

\$35,300 represents the Mellon portion of Musician Services for 67 full-time LPO musicians and four extras for one concert (May 12, 2012). The total cost of \$70,600 represents 67 full-time LPO musicians and four extras for two concerts.

\$7,000 represents the total Conductor fees for two concerts and Carlos Miguel Prieto's master classes, LSU orchestra rehearsals, and campus activities.

\$25,000 represents Library fees for the cost of orchestration for the Champions Square concert.

\$3,650 is allocated for Musician Fees for Streaming expenses for the Champions Square concert. Cost of Musician Fees for Streaming and output for the first concert at St. Louis Cathedral is free.

\$18,000 represents the Mellon portion of Marketing expenses. \$25,250 represents the total cost of Marketing expenses including print ads (25%), radio ads (30%), social media (5%), design and production (10%), printing (15%), and mailing (15%).

Venue fees in year one have been negotiated with THNOC and SMG and will be free.

\$1,360 represents an estimate for Extra Musicians Travel and Lodging for four to six musicians.

\$2,000 represents the Mellon portion of Guest Artist Fees anticipated for side men for Troy “Trombone Shorty” Andrews at the Champions Square concert. The total \$6,000 for Guest Artist Fees also includes the cost of two pianists and a singer for the St. Louis Cathedral concert.

\$50,000 represents an estimate for Recording and Technology Expenses for the streaming and output for the St. Louis Cathedral concert provided by Wild Hare Productions, LLC, a company that must be used at St. Louis Cathedral, and for the Champions Square concert provided by the Solomon Group. Expenses include equipment, personnel, setup, and breakdown for a three High-Definition Camera Live Production Mix of the LPO concert; encoding and broadcast of the performance for internet streaming; and uplink and broadcast of the concert to host locations on the LONI network, the third party streaming provider, and the LPO website.

\$10,000 represents a standard estimate for Other Production costs for lighting, sound, or staging.

\$1,500 represents expenses for a total of seven LPO musicians to teach master classes to LSU constituents a total of one to two times per semester.

Year Two

Income

The total project budget for year two will include support from THNOC in the amount of \$49,800 along with \$10,000 in Sponsorship, which is anticipated for the Champions Square concert after year one, and \$2,500, which is anticipated from the Louisiana Endowment from the Humanities. \$228,899 is anticipated from Mellon funds. An additional \$182,000 in-kind is estimated from LSU and includes \$120,000 for projected portions of salaries and fringe benefits of CMDA staff and faculty for technical, professional, and advisory commitments to project activities; \$32,000 in Equipment; \$20,000 in Space and Facility use for recording and editing; and \$10,000 for Internet Bandwidth and Connectivity as well as performances by LSU constituents.

Expenses

Total expenses include a portion of personnel salaries, not including benefits, funded by Mellon:

\$20,877 represents 25% of the LPO Managing Director’s salary for planning and execution of partnership-related activities and concert series.

\$10,200 represents 20% of the LPO Director of Artistic Planning’s salary for time related to planning LPO and LSU concerts and streaming events.

\$26,062 represents 52% of the LPO Manager of Artistic Operations and Performance Technology’s salary for time and additional responsibilities related to planning LPO and LSU concerts and streaming events.

\$20,000 represents costs for two LPO Operations Interns for two semesters annually hired by LPO and working with LSU and the partnership.

\$4,500 represents the total cost of the Personnel Manager for two concerts.

Collaborative Performances provided by LPO:

Total costs for Collaborative Performances include the cost of two concerts planned for year two: the January 2013 concert and the May 2013 concert.

\$35,300 represents the Mellon portion of Musician Services for 67 full-time LPO musicians and four extras for one concert. The total cost of \$70,600 represents 67 full-time LPO musicians and four extras for two concerts.

\$7,000 represents the total Conductor fees for two concerts and Carlos Miguel Prieto's master classes, LSU orchestra rehearsals, and campus activities.

\$4,500 is allocated for the total cost of Library fees for two concerts.

\$7,300 is allocated for Musician Fees for Streaming expenses for two concerts.

\$26,800 represents the Mellon portion of Marketing expenses. \$30,550 represents the total cost of Marketing expenses including print ads (25%), radio ads (30%), social media (5%), design and production (10%), printing (15%), and mailing (15%).

\$16,000 represents the Mellon portion of Venue costs; \$18,000 is allocated for the total cost of Venues for two concerts, which were free in year one.

\$1,360 represents an estimate for Extra Musicians Travel and Lodging for four to six extra musicians.

\$3,500 represents the Mellon portion of Guest Artist Fees; \$15,000 represents the total cost of Guest Artist Fees for two concerts.

\$50,000 represents an estimate for Recording and Technology Expenses for the streaming and output for the St. Louis Cathedral concert provided by Wild Hare Productions, LLC and for the Champions Square concert provided by the Solomon Group. Expenses include equipment, personnel, setup, and breakdown for a three High-Definition Camera Live Production Mix of the LPO concert; encoding and broadcast of the performance for internet streaming; and uplink and broadcast of the concert to host locations on the LONI network, the third party streaming provider, and the LPO website.

\$10,000 represents a standard estimate for Other Production costs for lighting, sound, or staging.

\$1,500 represents expenses for a total of seven LPO musicians to teach master classes to LSU constituents a total of one to two times per semester.

Year Three

Income

The total project budget in year three will include \$75,000 in revenue from Patron Ticket Sales to the festival, \$20,000 from Corporate Sponsors, an estimated \$35,500 from THNOC or other Foundation Sponsors, and an anticipated \$2,500 from the Louisiana Endowment for the Humanities. \$306,267 is anticipated from Mellon Funds. An additional \$182,000 in-kind is estimated from LSU and includes \$120,000 for projected portions of salaries and fringe benefits of CMDA staff and faculty for technical, professional, and advisory commitments to project activities; \$32,000 in Equipment; \$20,000 in Space and Facility use for recording and editing; and \$10,000 for Internet Bandwidth and Connectivity as well as performances by LSU constituents.

Expenses

Total expenses include a portion of personnel salaries, not including benefits, funded by Mellon:

\$23,382 represents 28% of the LPO Managing Director's salary for planning and execution of partnership-related activities and concert series.

\$15,300 represents 30% of the LPO Director of Artistic Planning's salary for time related to planning LPO and LSU concerts and streaming events.

\$30,075 represents 60% of the LPO Manager of Artistic Operations and Performance Technology's salary for time and additional responsibilities related to planning LPO and LSU concerts and streaming events.

\$20,000 represents costs for two LPO Operations Interns for two semesters annually hired by LPO and working with LSU and the partnership.

\$4,500 represents the total cost of the Personnel Manager for two concerts.

Collaborative Performances provided by LPO:

Total costs for Collaborative Performances include the cost of three concerts planned for year three: a January 2014 concert and two festival concerts in May 2014.

\$35,300 represents the Mellon portion of Musician Services for 67 full-time LPO musicians and four extras for one concert. The total cost of \$105,900 represents 67 full-time LPO musicians and four extras for three concerts.

\$10,500 represents the total Conductor fees for three concerts and Carlos Miguel Prieto's master classes, LSU orchestra rehearsals, and campus activities.

\$5,000 is allocated for the total cost of Library fees for three concerts.

\$14,600 represents the Mellon portion of Musician Fees for Streaming expenses for three concerts.

\$34,530 represents the Mellon portion of Marketing expenses. \$38,330 represents the total cost of Marketing expenses including print ads (25%), radio ads (30%), social media (5%), design and production (10%), printing (15%), and mailing (15%).

\$20,000 represents the Mellon portion of Venue costs for three concerts; \$28,000 is allocated for the total cost of Venues for three concerts.

\$4,080 represents an estimate for Extra Musicians Travel and Lodging for four to six musicians for three concerts.

\$20,000 represents the Mellon portion of Guest Artist Fees anticipated for two concerts. \$38,600 represents the total cost of Guest Artist Fees for three concerts.

\$75,000 represents the Mellon portion of Recording and Technology Expenses for the streaming and output for one St. Louis Cathedral concert provided by Wild Hare Productions, LLC and for two Champions Square festival concerts provided by the Solomon Group. Expenses include equipment, personnel, setup, and breakdown for a three High-Definition Camera Live Production Mix of the LPO concert; encoding and broadcast of the performance for internet streaming; and uplink and broadcast of the concert to host locations on the LONI network, the third party streaming provider, and the LPO website.

\$10,000 represents a standard estimate for Other Production costs for lighting, sound, or staging.

\$4,000 represents expenses for a total of seven LPO musicians to teach master classes to LSU constituents a total of one to two times per semester.

F. Financial Notes

N/A

Appendix F.

Classics 13 Extra Musicians Travel Costs

Classics 13 Extra Musicians Travel Costs

LPO - TRAVEL LIST	CONCERT/CLASS	ORIGIN		TRANSPORTATION COST	TOTAL TR/CLASS
Carmen Lemoine	CL13	San Francisco, CA	flying	\$438.90	
Allan Kolsky	CL13	Syracuse, NY	flying	\$438.20	
Patricia Skye-Jennings	CL13	San Diego, CA	flying	\$450.20	
Gina Dyches	CL13	Houston, TX	driving	\$0.00	
Ching Yi-Lin	CL13	Nashville, TN	flying	\$373.10	
Andy Braddock	CL13	Nashville, TN	flying	\$373.10	
Robb Aistrup	CL13	Boston, MA	flying	\$567.00	
Kyle Larson	CL13	Dallas, TX	driving	\$0.00	
Kimberly Houser	CL13	Baton Rouge, LA	driving	\$0.00	
Jim Karrer	CL13	Tucson, AZ	flying	\$286.15	
Ryo Fukuda	CL13	San Jose, CA	flying	\$492.00	\$3,418.65

Appendix G.

TRG Marketing Firm LPO Case Study

Case Study: Louisiana Philharmonic's Post-Katrina Comeback



THE SCENARIO:

Louisiana Philharmonic Orchestra (LPO), like many organizations in the Gulf coast, faced an uncertain future after Hurricane Katrina struck in 2005. By 2009, New Orleans had seen its population start to stabilize. However, LPO's patron base had not rebounded as quickly as the city it serves. Attendance was 26% below pre-Katrina levels. The Orchestra still faced significant challenges:



BEFORE: Post-Katrina Interior of Orpheum Theatre



AFTER: LPO's new performing home in Mahalia Jackson Theater

Performance home destroyed. Katrina wiped out LPO's home, the Orpheum Theatre. By 2009, LPO was still performing in various churches in New Orleans and the surrounding parishes, getting only a few dates in the restored Mahalia Jackson Theater for the Performing Arts, located in Armstrong Park. LPO saw the expansion into other parishes as an opportunity to move the orchestra out into the region and gain new audiences. However, this nomadic existence denied LPO and its valued patrons the

fundamental benefit of subscribing—the ability to have the best seats at the best price and renew those preferred seats year after year. Without a home:

- LPO patrons found the multiple performance venues confusing and in some cases, inconvenient.
- Because ticket buyers were seated in pews, it was nearly impossible to manage inventory and control the number of seats sold at various price points. A disproportionate number of the least expensive seats sold, depressing average revenue yield per ticket.

- Tracking patron data and tickets sold in the different halls was difficult. LPO's ticketing system could not accommodate multiple halls and the Orchestra, prompting creative but labor-intensive work-arounds such as paper orders, cash box, and manual ticketing.
- Several classical concerts had to be repeated in church venues to accommodate patrons holding prime seats. The downside was more capacity than demand which hurt the perception of success.

Database troubles. Katrina also exacted a heavy toll on LPO's database. Patron contact information recorded prior to Katrina was no longer reliable. Many patrons had left or moved, and some addresses no longer existed. With LPO performing in venues without a box office, a card table and a cash box had to suffice; the Orchestra could no longer effectively collect contact information for walk-up single ticket buyers. These difficulties limited the scope of the Orchestra's direct marketing efforts because cleaning and deduping patron data was manual and labor-intensive. The loss of the Orpheum and the blow to LPO's database had a substantial negative impact on the Orchestra's ability to reactivate former patrons and retain current ones.

THE COMEBACK RESULTS:

TRG consultants started working with the Louisiana Philharmonic in the middle of the 2008-09 season. Since then, the Orchestra has seen dramatic results, especially in the growth of subscription and associated revenue. During three years of working with TRG, LPO has achieved:

- 71% increase in subscription units sold,
- 75% increase in subscription revenue,
- 49% one-year subscription revenue growth in 2009–10, LPO's first full year working with TRG,
- An all-time high in subscription revenue for 2011–12.

TRG BUSINESS INTELLIGENCE

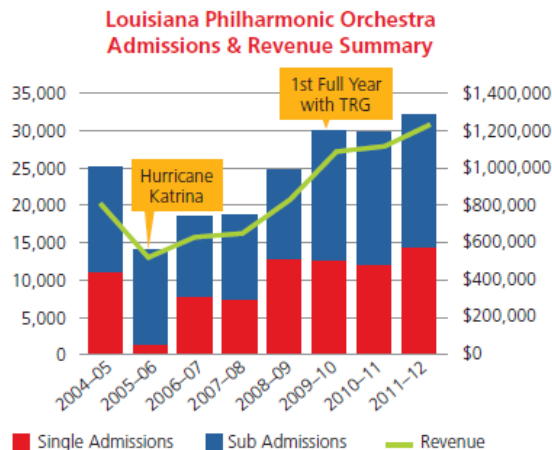
Consumer Behavior
Demand Analysis
Patron Profiles

TRG DATABASE MANAGEMENT

All-Data Warehousing
On Demand, Online Access
Consumers and their Transactions

TRG CONSULTING

Consumer Loyalty
Optimal Pricing
Maximum ROI, Revenue



HOW THEY DID IT:

TRG consultants working with the LPO were optimistic from the start. The local population had stabilized somewhat and, the entire team—management, the music director and the musicians—supported change wholeheartedly. Patrons who had stuck by the LPO from its pre-Katrina days remained staunchly loyal.

There's no place like home. In the newly renovated Mahalia Jackson Theater, the LPO was able to offer subscribers assigned seats of their own in a world-class performing arts venue. Orchestra staff also could manage inventory for single ticket buyers much more effectively. After performing for years in up to seven different halls, TRG consultants encouraged LPO to perform as many concert dates in Mahalia Jackson as possible so that patrons could embrace the Orchestra's "new home," while continuing to grow audiences in newfound markets.

Subscriber-focused pricing. With a new home, LPO could simplify subscription pricing based on seating in one hall, providing the prized subscriber benefit of "best seats at the best price." Consultants created a pricing strategy that rewarded loyalty—offering greater discounts to subscribers who attend more often with a discount proposition that buying the largest subscription package was like getting

one superstar classical artist for free. This value proposition and LPO's commitment to sell subscriptions grew the full 13-concert series by 29% and the 8-concert series by 24% in 4 years.

Database Makeover. LPO addressed its problems with incomplete database records and ticketing system shortcomings in one major investment. During the 2010–11 season, LPO licensed the ticketing system Audience View, which gave the Orchestra remote ticketing capabilities as well as transparency around all patron activity. Because the new system goes wherever LPO performs, the Orchestra can capture patron contact data and transaction information faster and more accurately. During the transition, TRG provided database services that helped bridge the multiple systems, clean and update data, and inform the choice of best prospects. LPO staff could now plan direct mail campaigns with dramatically increased response rates.

Optimizing outcomes from fewer concerts. TRG recommended cutting repeat performances in First Baptist New Orleans (FBNO), one of the LPO's regular performing venues to ensure the hall always looked full. Additionally, the pops series was no longer profitable. While Pops was a big draw for single ticket buyers, the series represented only 8% of all subscriptions. LPO decided to drop the Pops series and continue to program individual pops concerts as add-ons. LPO is a musician-owned orchestra, so musicians have a vested interest in its success. They supported the change in pops concerts, realizing it meant fewer opportunities to perform while gaining greater opportunity to grow elsewhere. As a result, LPO achieved growth by keeping a laser focus on growing the subscription base and selling more tickets for every individual concert.

ABOUT THE LOUISIANA PHILHARMONIC: Founded in 1991, the Louisiana Philharmonic is the only musician-owned and collaboratively managed professional symphony in the United States. The LPO performs a full 36 week concert season each year. For more information, visit www.lpomusic.com.

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